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FALL TV 2010

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will the industry see
the forest for the trees?



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ON THE COVER This month, our executive editor Mary Maddever trekked out into the woods with her camera to capture the image of a desolate forest. The circular effect was created in truly high-tech fashion...by her assistant (son Christopher) vigorously shaking her arm. The image was then passed on to our creative director Stephen Stanley, who added an old-school TV and threw in some autumn flare to a decidedly upfront green summer forest. Proving our cover thesis, it's a digital world.





Get with the new program

I may like TV too much. When the pilots for Fall TV arrive in June, I scoop them up and run home for a marathon screening, skipping upfront parties for a first look at *Hawaii Five-O* and *\$#*! My Dad Says* (a.k.a. what William Shatner is up to this year). I think Global and CTV respectively have shows here that all ages may like.

Usually my teenage son plops down to watch the pilots with me – he may also like TV too much – but this year he was busy catching up on episodes of shows he'd discovered online. And therein lies the caveat – I say “may like” for this year’s crop, because the discovery of new shows is happening differently now. A lot of youth sit down and watch whole series online, so while they’re not reducing their TV regimen, it may not involve an actual TV set, and let’s face it, often not Canadian network sites.

Finding *Community* late in its broadcast season is no longer a problem. Fans catch up online, and stats show that’s growing more mainstream. That sounds like a good thing for the network’s eyeball business, more opportunity to collect an audience. But advertisers still aren’t valuing online viewers to the degree a TV viewer is valued, and that’s impeding the development of the digital side of the biz. Which is necessary. And inevitable.

And it’s a lost opportunity. When I watch “my shows” on the nets’ nice new online players, I tend to see the same darn ad over and over again. I would actually welcome being targeted more precisely or engaged more interactively. A magazine ad recently lured me online to a video contest, so if I’m already online, I’m likely easier game.

It’s not just a TV phenomenon. The *New York Times*’ whole iPad endeavour seems to be supported by one watch ad. This is kind of a problem.

TV is still solid (advertising is expected to grow at an annual rate of 3.8%) but the lure of online viewing is causing a generational shift in how it’s consumed. In the story “Wandering Eyes” on p. 21, Cossette Media’s Nick Barbutto says many youth are not getting cable when they get their own place, and he thinks conventional TV may soon go the way of landlines with this demo.

The keynoter of *strategy*’s recent Understanding Youth event, Dr. Adam Klein, who teaches digital business models to Columbia journalism students, says his students don’t have TVs and no longer consume media in a linear fashion. They are transmedia natives, experiencing content from many different touchpoints, and Klein, who has headed up and consulted for a who’s who of tech and media brands, says this calls for planning differently to reach them.

Which begs the question, if 24/7 digital asset access is the new glue on that front, shouldn’t online eyeballs be valued more by advertisers? And shouldn’t networks be targeting them differently? Right now the network sites seem geared to helping out the poor souls who miss episodes, rather than reaching out to an audience who aren’t already within its TV net.

When you look at the music industry, you see what kind of damage can be wrought by not moving the business model along with the consumer’s consumption wishes. But when so much money is at stake, and so many business models are rooted in planning from a certain starting point, inertia is inevitable. Change does not come easy, someone has to step out on the limb.

So it’s great to see the social TV forays being made by the likes of CBC (see “New Frontiers,” p. 26), but networks need more media agency/advertiser support for a concerted sea change to a digitally led strategy.

Canada is now at a crossroads. Canadian producers have a new federal funding model kicking in that requires TV properties to also have digital iterations. So, the additive content to create a new model is coming. It’s time for a new mindset – reconsider the value of that growing segment of online TV viewers, and reach out to the transmedia tribe with content that leads them to Canadian network destinations. And don’t wait until they’ve moved on.

Cheers, mm

Mary Maddever, exec editor, *strategy*, *Media in Canada* and *stimulant*

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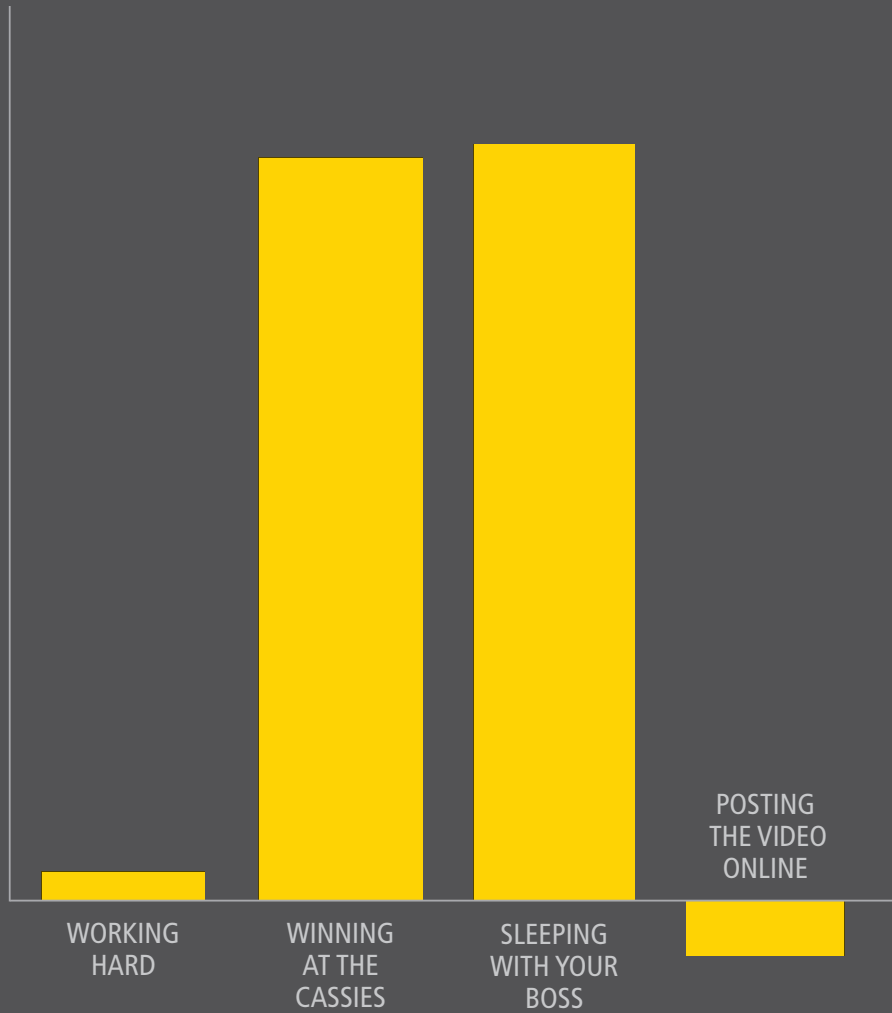
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SPONSORED SUPPLEMENT

SHELF HELP A GUIDE TO SHOPPER MARKETING

Shopper Marketing is just starting to gain the much-deserved attention in Canada that it's getting south of the border. Looking to leverage shopper behaviour at the point of sale and beyond?

See page S50 for the lowdown on this phenomenon and how to apply it.



UPCOMING SUPPLEMENTS

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INTRIGUE SURROUNDS SAPPORO'S LEGENDARY BIRU

Sapporo has been on shelves in Canada for several years now, but it decided that the time was right to raise the profile of its legendary biru (Japanese term for beer). Developed by Toronto-based Dentsu Canada, the Japanese beerco launched its first ever full-scale advertising campaign in Canada last month. Its aim is to instill a sense of intrigue to attract 19- to 25-year-old hip, intelligent dudes looking to be seen as unique and interesting. Research indicated that consumers are fascinated with all things Japanese, says Scott Pederson, national marketing manager, Sleeman Breweries.

"We learned right away that the Japanese origins of Sapporo provided us with a lot of really good raw material to work with strategically," says Pederson.

Set to the beat of a chorus of Japanese drums, a TV spot takes viewers on a tour through a mythical Sapporo brewery where the biru is mixed in the presence of sumo wrestlers and heated by the fiery breath of dragons. The effort also includes a microsite, Legendarybiru.com, which features a contest awarding a trip to Japan, social media, POS and a beer tap handle in the form of a kitana sword. Media for the effort was handled by Carat.

"There's a lot of potential to take this platform forward and constantly keep it fresh," says Pederson.

Sapporo first made waves in Canada when it bought Sleeman back in 2006. "Legendary Biru" will remain in market until the end of August. **JP**



MERCEDES TAPS HISTORY



"The best or nothing." That's Mercedes' ballsy new global brand positioning, its first worldwide slogan since 2005's "The future of the automobile."

The time

seems right to launch a communications offensive – this year and in 2011, Mercedes will introduce 16 new or upgraded models.

A campaign, created by Jung von Matt in Germany and adapted in Canada by Toronto-based BBDO, backs up the "best or nothing" claim by chronicling Mercedes' history, harkening back to Gottlieb Daimler's pursuit of perfection. The launch spot depicts Mr. Daimler himself, and documents various breakthrough Mercedes models over the decades.

Creative also features three actual Daimler employees, such as Professor Gorden Wagener, head of design. The campaign, which includes print and online, will run until September. An updated logo with a 3D appearance and chrome finish was also introduced. **EW**

VIRGIN'S GOT GAME AND CASH. wOOTt!

BY JONATHAN PAUL



Virgin wants to do for gaming what online poker did for Texas Hold 'Em.

Last month it launched its newest venture, Virgin Gaming.

It's a Facebook-esque destination for console gamers of all skill levels looking to play in head-to-head matches and tournaments for points, cash and prizes, all from the comfort of their own couch.

Headquartered in Toronto, Virgin Gaming has a satellite office in

London, and plans to open an office in Los Angeles in the next seven to eight months.

On top of on-site advertising, opportunities for brands to get involved, like tournament sponsorships, are plentiful.

"We're being approached by numerous brands that want to do promotions and



contests," says Rob Segal, CEO, Virgin Gaming (pictured at left), and Sony and retailer Game Stop are already onboard. Sony's partnership features a tournament surrounding its *ModNation Racers* title, and the prize is a trip to Las Vegas, PSP swag and a new Sony TV. Canadian-specific brands looking to get into the game could headline Canadian-only tournaments.

Working with Cossette in Canada and Rocket XL in California, Virgin Gaming has concentrated promotions for its launch phase online, using internet ads, search, email and social media, including a Facebook page.

PR is also on the roster, with Toronto-based Splash Public Relations handling efforts in Canada, New York-based Highwater Group in the U.S. and London-based Lunch in the U.K. Traditional advertising, being developed by Petrol in California – including TV, print and POS, as well as in-game and experimental – is set to launch closer to the fall. Virgin Gaming is also partnering with game publishers.

"We're already working to do things with them on television," says Segal. "There are going to be retailer-based promotions, as well, and we're going to do our own content for videogames in the online space."

WATER COOLER

ASKING CANADIANS



You know those ad campaigns – the ones that seem to go on for years and never die. Some of them become part of our cultural vernacular, while others make us cringe and wonder why they still exist. We wanted to know which current campaigns have survived past their prime.

Which campaign has jumped the shark?

Philadelphia Cream Cheese's angel	45.7%
A&W's manager and underling	18.3%
Rogers's group of young spokespeople	15.1%
Westjet's owner-employee campaign	10.9%
I'm not familiar with these ads	10%

This poll of 1,000 Canadians was brought to you by the AskingCanadians™ Pulse Omnibus. The poll was conducted from May 17 to 19, 2010. AskingCanadians™ Pulse Omnibus is owned and operated by Delvinia Data Collection. www.delvinia.com

AGENCIES OF THE YEAR SHORTLISTS

After agencies from all over the country submitted their top campaigns for *strategy's* Agency and Media Agency of the Year competitions, and after weeks of polling top marketers and agency brass from coast to coast, the shortlists can finally be revealed. This year's shortlists are notably less short, proving that the race has been tight so far, with a couple of newcomers ready to battle for top spot. Next, a panel of industry judges will determine the overall winners, which will be announced at an awards show in the fall, and in the November issue of *strategy*. Agencies, start your engines.

MAOY shortlist

Bleublancrouge
Carat
Cossette
Initiative
M2 Universal
MEC
Media Experts
MediaCom
Mindshare
OMD
PHD
Starcom MediaVest
UM
Vizeum
ZenithOptimedia

AOY shortlist

BBDO
Cossette
DDB
John St.
Juniper Park
JWT
Leo Burnett
Lg2
Lowe Roche
Rethink
Sid Lee
Taxi
TBWA\Toronto
Zig

"the best or nothing"

Brilliant!

BY MELINDA MATTOS



HMV OFFERS REWARDS FOR DOWNLOADS

HMV Canada has unveiled a loyalty scheme it hopes will help revive the flagging music retail game, by dangling autographed collectibles and tickets to sold-out concerts.

"[The new program] is at the centre of our broadening entertainment proposition," says Humphrey Kadaner, president of HMV. The retailer just launched download site Hmvdigital.ca and this summer it'll be stepping up its retail offerings to include apparel and accessories, more tech items and books, and a wide array of headphones with price points up to \$350. It's a one-stop-entertainment-shop model reminiscent of Virgin Megastore.

Launched mid-June, the new Purehmv rewards card sells for a \$3 annual fee. Points earn discounts or "exclusive money-can't-buy" rewards: 40,000 gets an autographed Justin Bieber plaque-mount, while 20,000 nabs a film cell from *The Twilight Saga: New Moon*. Kadaner says there's been a void since HMV's "buy 10 get one free" card was discontinued in 1999. "[Staff] still have people walking in presenting those cards or asking about them," he says.

The Canadian program is modelled after Purehmv U.K., which launched in May 2009, but Kadaner says they've made a few modifications. The U.K. launched modestly, with employees simply promoting the program at the cash. Here there's also a strong reliance on staff, with the addition of external media in newspapers and cinemas; POP-window posters, counter inserts and postcards; plus a push via Facebook, Twitter and newsletters.

HMV's strongest demo is 13- to 24-year-olds, and while Kadaner says they're often the toughest to reach with loyalty programs, he's confident this will be a hit. With signed Bieber merch up for grabs, he could have a point.

TOP 5 **WORLD CUP** BRAND PLAYS

BY JONATHAN PAUL



News of brand activity around the FIFA World Cup has been flooding our inboxes since the first whistle blew. With the final quickly approaching (July 11 at 2 p.m. on CBC) we thought we'd give you a rundown of some of the top World Cup-related promos, and also see how many football-related puns we can make.

CIBC was quick to get on the ball with a cross-Canada trek by Toronto-based Fuse that includes brand ambassadors and banking staff biggin'-up its sponsorship of CBC's *Soccer Nation*. The CIBC team is being whisked across the country in a thematically wrapped RV, attending nine soccer tournaments, and making pit stops at local branches. The bank asked football fans to submit videos to a "Soccer Everywhere" YouTube contest for the chance at three \$10,000 prizes. And, of course, it has a slate of TV ads supporting its World Cup broadcast sponsorship.

Speaking of YouTube, it's the playing field Visa chose to launch a branded online hub for football fanatics to express their enthusiasm. Visa called for video submissions showing fans supporting their favourite team and shouting "GOOOOOAAAAAL" to its Visa Go Fans YouTube channel by TBWA\Toronto. If visitors keep their eye out for special "Golden Videos" they might win tickets to the 2014 FIFA World Cup in Brazil.

Hyundai, an official World Cup sponsor, took a shot at reaching football fans where they gather to watch the game with a media strategy by ZenithOptimedia. On top of print executions in the *Toronto Star* and the *Toronto Sun*, and OOH and TV spots targeting

ethnic markets on TLN and Fairchild TV, the carco went digital with a sponsorship of The Score's game-tracking mobile app, a microsite with an excuse generator for those looking to get out of work to catch morning games, and a Facebook page that lets diehards create a personalized jersey that they can post to their own profile.

Since it's ruled offside for any net other than CBC to feature World Cup coverage, Rogers found a way to leverage the tourney without being red carded with the launch of its own football-themed barker channel. It broadcasts team and player profiles, match previews, news, scheduling and tournament updates, while airing promo messages advertising its On Demand services. Viewers can interact with the channel by passing text messages to a live chat zone.

And team Adidas, as usual, is all over the World Cup: on TV, in print, on the net, hell, even in the net (the official Jabulani ball is by Adidas). Montreal-based Sid Lee served up an effort with some spin with a viral vid featuring celebrity punters David Beckham and Snoop Dogg. Embracing the international nature of the tournament, the vid takes place in the Mos Eisley Cantina on Tatooine. Yes, the very same Tatooine where Luke Skywalker was born. The vid promotes Adidas' Originals line and its association with Lucasfilm and the 2010 FIFA World Cup. Ahh, Adidas, Sid Lee and football, the force is strong with those three.

AN APP BEYOND STATS



Here's a World Cup app we think scored because it wasn't your typical info-updating, jersey-displaying, flag-waving app. Developed by Toronto's Grip Limited for Budweiser, it let people display their team colours by uploading a picture of themselves to the beerco's Facebook page, then using

paintbrush tools, or a pre-designed pattern, to paint their faces in the image of their favourite squad. The photos could be made into profile pics or downloadable cards, and each was added to a mosaic of the chosen team's flag, letting users see their fellow supporters. One lucky participant is headed to the finals on July 11.

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SELL LIKE A MAN, MAN

BY MELINDA MATTOS

After 13 years of marketing diapers and laundry detergent to women, P&G's Robb Hadley got drafted to the men's grooming team, taking over Gillette, Old Spice and Braun – and the difference has been more dramatic than he expected



P&G's Robb Hadley believes in the power of WOM: "When guys find a product they love, they talk about it to their friends."

As brand manager of male grooming at Procter & Gamble, Robb Hadley knows a thing or two about Canadian men. First, they're hairy – some of the hairiest in the world, with a high incidence of chest foliage. They're also more likely to experience skin sensitivity than their American counterparts, with our harsh winters putting Canada close to Russia on that front. But when it comes right down to it, Hadley says, facial hair concerns differ as much between next-door neighbours as different nations.

"Local insight is important – that's where you find your focus," explains Hadley, 35, who manages Gillette, Old Spice and Braun in Canada. "But that should be about 20 to 30% of what we do, versus finding global consumer needs and meeting them."

And that global consumer need, where shaving is concerned, has always been comfort. Men have several opportunities a week to assess whether they're satisfied

with their razor, Hadley says. "If not, they're going to leave."

Consumers certainly have plenty of options. Research firm Datamonitor reports that in Canada alone, the men's care industry brought in \$1.6 billion in total sales last year. When it comes to P&G's corner of the market, Gillette has 10 brands and 136 SKUs (including razors, blades, shaving cream, hair care, body wash, deodorant and antiperspirant); Old Spice has one brand and 62 SKUs (including antiperspirant, deodorant, body wash, fragrance and body spray); and Braun has two brands and 40 SKUs (including electric shavers and body hair trimmers).

With constant innovation, men's grooming has never been an easy category, and it recently got tougher, with strong contenders upping their game and new players hitting the aisle. Unilever's growing Axe portfolio, which targets youth as they enter the category, competes with both Gillette and Old Spice, offering deodorant, antiperspirant, shower gel, hair care and body spray. Dove's Men+Care line, which launched earlier this year, challenges the same brands with its body and face wash. Although Dove's portfolio is limited, it speaks to a more mature audience and has strong ties to the female shoppers in men's lives.

For Hadley, who's spent more than a decade marketing to women at P&G, the men's grooming category is a welcome change of pace. Hadley joined the company as assistant brand manager for Tide in 1997, after starting a BBA at Wilfrid Laurier University and finishing at École Supérieure de Commerce in Rennes, France. He went on to become brand manager for Cheer, Gain and Dryel, then took a broadening assignment selling P&G's fabric and homecare portfolio to Zellers, before returning to marketing as brand manager for Pampers and then for the laundry portfolio. After a parental leave in 2009, he returned last September and assumed his current title, leading a team of six dedicated marketers, with a multifunctional team of over 20.

Since then, there's been a lot to learn. "I grew up in a P&G world that was really female focused – I know everything there is to



Former NFL wide receiver Isaiah Mustafa got big laughs with his performance in Old Spice's 2010 Superbowl spot "The Man Your Man Could Smell Like."

know about how to market laundry detergent primarily to women," he says, laughing. "I did not expect there to be that big of a difference, in terms of how guys consume media, how they react to advertising messaging, how they consider changing brands, but it's been far more different than I had expected."

One immediate difference is the tone of advertising. As Hadley notes, men's grooming "uses humour more than our female advertising does. It takes itself a little less seriously than it did 15 years ago." You can see this strategy at work in the "Gillette Body Shaving" digital campaign crafted by Toronto-based BBDO/Proximity Canada, which took home the North America Platinum Award at the 2010 International AME Awards. It shows how to shave various body parts, including the groin, with voiceover that smirkingly declares, "You might say, when there's no underbrush, the tree looks taller."

And, of course, there's the Old Spice "Smell Like a Man, Man" campaign – made famous by Wieden + Kennedy Portland's "Man Your Man Could Smell Like" commercial, which starred former NFL wide receiver Isaiah Mustafa. It called out men using "lady-scented body wash" and quickly went viral after its Super Bowl release.

But marketing to men isn't all yuks. Lately

Hadley's been hard at work launching Gillette's new razor, the Fusion ProGlide. Before the product hit shelves in June, over 100,000 samples had been distributed in person and through online giveaways, and 40 million Canadian PR impressions had been delivered with help from PR agency Porter Novelli in Toronto.



Gillette launched its new Fusion ProGlide razor in June, followed by a ProSeries skincare line in July.

Word of mouth has been a key factor in the launch, with "real guys" becoming brand ambassadors. In April, Gillette staged an event in Toronto's Yonge-Dundas Square with Toronto-based experiential marketing company GMR, delivering the ProGlide Challenge to passersby. Proximity, Gillette's global agency

for digital, fed video footage to the brand's Facebook page, so interested parties could see other men trying the product and post their own reviews.

Hadley says the goal of events like the ProGlide Challenge is to "take the experiential and amplify it digitally."

When Hadley spoke to *strategy* in May, pre-launch, he'd just returned from Montreal, where Gillette had shot its first local television spot in Canada in about 15 years. Very little of Gillette's advertising is produced in Canada (both the global and North American regional offices are based out of Boston) but Hadley says in this case, it was important to do so.

"The core idea behind the advertising [is] real guys trying the product, loving it and being converted from skeptics into believers," he says. "We needed to get local Canadian credible guys, and shooting in New York or Brazil or South Africa to try to replicate a French-Canadian accent would not be believable."

It's not the first time this concern about believability has come up. Gillette has a global platform called "Champions," which features pro athletes like baseball player Derek Jeter and tennis star Roger Federer. But the response in Canada hasn't been as strong as elsewhere.

"Every time we put those guys in front of Canadians, they were like, 'Yeah, I like them

but realistically they're not approachable, they're not relatable," Hadley says. "So as a Canadian organization we went out and looked to take the same strategy, which is achievement sports marketing, but [use it in] a more credible, relevant way."

The result was a branded content deal with Canadian sports station The Score last year to develop Gillette Drafted, a contest that yielded broadcast segments inspired by reality-TV franchises like *Idol* and *Top Model*. Hopefuls auditioned to become "Canada's next sportscaster" – using Gillette products to get ready for their closeup – and the winner nabbed a job at The Score and a one-year spokesperson contract with Gillette.

Hadley says Drafted is "all about achievement, it's all about confidence."

Of course, it's also about selling product. "Drafted is not just about blades and razors," he says. "It's about our antiperspirant business, it's about body wash, it's about the top of the equity pyramid, which is guys looking, feeling and being their best, supported by a whole portfolio of products. So there's scale marketing at a brand level."

The success of last year's campaign led to Gillette Drafted 2, now underway. In May and early June of this year, the company ran a six-city national audition tour with GMR, setting up the ProGlide Challenge beside it. Finalists will compete this month before a panel of judges, with episodes to air in the fall. This time around, however, the episodes will be 23 minutes long, replacing last year's eight-minute on-air segments, which Hadley says had started to feel "a little promotional" towards the end.

"Branded entertainment is not just about hitting the viewer over the head with product benefits," he says. "We've got 30-second advertising that does that." Moving to half-hour episodes will ideally increase the perceived legitimacy of the show and, as Hadley says, "deepen the emotional connection."

To complement the ProGlide razor, Gillette is launching a ProSeries skincare line this month, including a facial cleanser, a thermal



Run by experiential agency GMR, Gillette Drafted 2's sportscaster audition tour stopped in six Canadian cities.

facial scrub and an intense cooling lotion. Though these products are launching in direct competition with Neutrogena Men and Nivea For Men, which offer similar products at similarly affordable price points, Hadley believes his company is at an advantage, since Gillette (1895), Old Spice (1937) and Braun (1921) are all historically male brands.



The ProGlide Challenge offered passersby a free shave at Toronto's Yonge-Dundas Square this spring.

"Guys are more interested in grooming products than they were 30 years ago," Hadley says. "But they've got to be designed for men – it can't be a female product with a

man's label stuck on it... We've got 100 years of experience [at Gillette] building and designing products for men."

Mind you, Gillette has only been part of Procter & Gamble for five of those years. When P&G bought Gillette for \$57 billion in stock in 2005, it was the largest acquisition in P&G's history, and created the world's biggest CPG company. So how much has the brand's marketing plan changed since the buyout? Not much, according to Hadley.

"We've got a lot of Gillette heritage employees that continue to work in the P&G family. From a marketing standpoint, we haven't changed a lot," he says.

For Hadley, working on Gillette is almost like working for a different company, without leaving P&G: "We've retained a lot of how the original Gillette company operated, which was much more top-down, fast decision-making. They still operate more like that than P&G did, which was more of a ground-up, local consensus-building organization.

"We're five years in but we're still finding the sweet spot between making quick decisions, getting out and being nimble, and deeply understanding a local marketplace so we're winning consistently."

When it comes to consistent wins, Hadley says having access to Gillette's worldwide army of talent helps. "To be able to take the best [advertising] from the globe, put it into my marketplace and know it's going to win with my consumers, that frees my time up to invest more deeply with my retail partners and consumers," he says.

And it works both ways: because Gillette Drafted was recognized with a P&G Canadian Marketing Award, Hadley says it'll now be shared with marketers in other regions, who can develop their own versions. "That is a made-in-Canada idea that now is going to get exported all over the world," he says. ■

3 QUESTIONS

What do you like to do in your spare time?

"Invest time with my kids. Sandbox has replaced sand traps."

What's something people would be surprised to learn about you?

"I ride a bike to work."

What's your personal motto?

"All things in moderation, including moderation."

MOOSEHEAD TAPS OUTER SELF

BY JONATHAN PAUL

Moosehead thinks Canadians

have a problem: they spend too much time indoors. Through its newest campaign, it's trying to help them unlock a lesser-known part of the human psyche that yearns for the outdoors, the outer-self.

The effort, which launched in May, conveys what Moosehead defines as its three main brand pillars – independence, nature and Canadiana – and aims to firmly entrench them, especially its positioning as a complement to outdoor activity, in the minds of Canadians.

"We want to create that emotional connection with our consumers," explains Matt Johnston, VP, marketing, Moosehead.

Developed by Toronto-based John St., the campaign includes three TV ads that establish the notion that Moosehead and nature walk hand-in-hand. A spokesperson points out the foibles of "modern-day advancements" like indoor gyms and ergonomic office seating, suggesting that they are actually designed to keep people away from their outer-self. A microsite, Facebook page and POP further engage beer drinkers. At Outerself.ca, they can send postcards to friends from their outer-self and use a patio finder to help them get outside. People can also upload photos to an outer-self Flickr group, which become backdrops for the microsite.

We asked **Karen Howe**, senior VP and CD at Due North Communications, and **Jason Keown**, senior director, marketing, at Burger King, to tell us if Moosehead's psychological exercise will be enough to get Canadians out of the gym and into the great outdoors.



OVERALL PLAN

Howe: Unleashing your "outer-self" is refreshing beer territory. It packages up a Canadian insight: when you only have seven minutes of summer, one builds a mighty strong emotional bond with the little time we do have to spend outdoors with a cold one clutched in our hand.



Keown: Moosehead is a good brand and this is a very safe campaign. No one can dispute that outside is better than inside and that outside is a good place to drink beer. But a deeper insight is required if their goal is to create or strengthen an emotional connection with their customers.



ONLINE

Howe: The online offers great campaign integration and meaningful content. There's some silly, fun stuff (quiz/symptom list) but it also builds nicely on the target group's interests and offers some real value-adds such as a list of hiking trails, cycle paths, etc.

Keown: Any brand trying new things online should be commended and providing a forum for like-minded people to connect is terrific. As this campaign evolves, I would expect newer location-based (and outdoor-friendly) social networks used to support the central message. Small thing, but I hope they can also decrease the amount of grammatical errors coming from the "official" Moosehead discussion postings.



TELEVISION

Howe: The TV takes an entertaining look at the claustrophobic indoor hamster wheels that gyms, offices and online games have become. It effectively lures us outside to the bonfire for a frosty Moosehead.

Keown: The idea of inside (bad!) versus outside (good!) is pretty clear. The comedy and juxtaposition is low key, intentionally I'm sure, to reflect the brand's tone. These spots sell the outdoors and the website, not necessarily the beer.

OUTER-SELF DISCOVERY

Howe: While other beer brands have tackled our love of the great Canadian outdoors, none have done so in such a comprehensive and well-rounded manner. This campaign is a very big idea with lots of room to grow – outside, of course.

Keown: I understand that this is the first campaign from a new client/agency relationship and that both sides had to play it safe. The love of outdoors is rich territory to connect with Canadians and this brand does belong there. I look forward to future campaigns where they will take some risks, tell us truths about ourselves that we don't realize and define how Moosehead's view of nature differs from the other brands.

The creds CDs **Angus Tucker, Stephen Jurisic**; associate CD/copywriter **Chris Hirsch**; associate CD/AD **Nellie Kim**; agency exec producer **Michelle Orlando**; account service **Ian Brooks, Mark Graham, Andrew Godfrey**; director **Ric Cantor**; prodco **Circle Productions**; exec producer **Michel Korchinsky**; editor **Griff Henderson (Poster Boy)**; audio **Vapor**; web production **One Method**; interactive producer **Carrie Weston**

OUTSTANDING NEW CAMPAIGNS

BY JONATHAN PAUL



NIMBY BURGERS DO CHEEKY RETRO

Nimby burgers are made by 100% real humans. That's the assurance that the new burger joint on the block, Nimby Burger, is making to Vancouverites in its inaugural promotional campaign.

Joey Restaurant Group president Jeff Fuller was on a quest for the "just-right burger," but it was something he couldn't find in Vancouver. So, in May, he opened Nimby Burger, a modern spin on the old-fashioned burger stand, with real ice cream milkshakes, hand-cut fries and only five items on the menu.

With Vancouver-based Spring Advertising on board to inject a fresh attitude into all elements of its quirkily retro brand design, Nimby, which stands for "not in my backyard," debuted by providing free sampling to Vancouver's culinary elite at *Vancouver Magazine's* 2010 Restaurant Awards.

"We know that a good product will create its own customer base, so our promotional activities needed to have a strongly branded sampling component," says Britt Innes, marketing director, Joey Restaurant Group. "Our instant Nimby location at the Vancouver Restaurant Awards was a perfect opportunity to get a buy-in from the city's foodie culture."

The brand's ads, design elements and website (which features a lineup cam) reflect the heritage, traditions and appearance of the modern-day walk-up burger stand's forbearers using cheeky language and imagery.

Ads ran in *Vancouver Magazine's* awards edition and in the *Vancouver Sun* and a strong social media presence promoting Nimby's opening was also established via Twitter and Facebook.

Nimby also took advantage of the location of its first restaurant, right across the street from Kits Beach, to break through to the beach-going crowd. It introduced the world's first "flying coupon" – Frisbees that employees throw at passersby, who can cash them in for free burgers.



advertiser: **Nimby Burger**
agency: **Spring Advertising**
designer & art director: **Jeremy Grice**

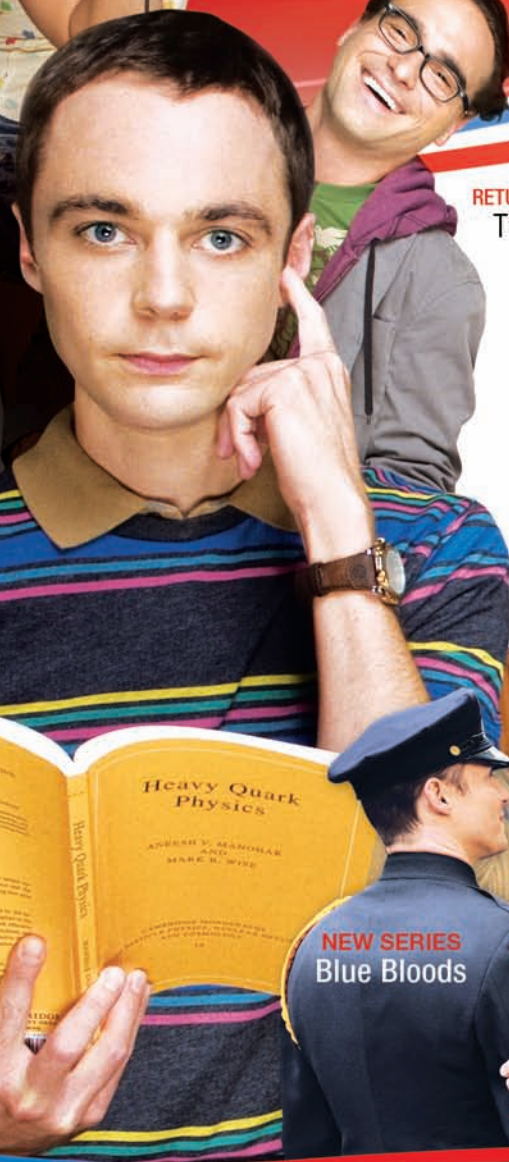
creative director: **Rob Schlyeicher**
copywriting: **Rob Schlyeicher & Jessica Mori**





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Fall tv 2010

It's not a dial war anymore, it's an all-out battle fought on many fronts.

Once again, the mediascape faces change – in ownership, in viewership and no doubt in ad impact.

The masses still love their MTV (and CTV, and Global, and CBC, and City, etc.), but they're getting this content – and more – when and where they want; and as the record industry proved, consumer-led consumption shifts can leave biz models broken. This will be a crucial year for the media industry to get the mix right.

While a few more pre-roll spots in rotation on the new and improved online players would be a nice sign, there's lots of good momentum signaling the industry is adapting. Changes to Cancon funding are triggering more non-TV platforms for Canuck entertainment properties – so there's more options for the transmedia natives in the audience – and advertisers are increasingly seeking closer ties to content, both online and on air, so there are ways to monetize them as well.

Read on to find out whose multimedia battle plan best positioned them for integrated success, and whose 2010 programming strategy looks the savviest...

From top: Stay tuned this fall for *Mr. Sunshine* (CTV), *Scoundrels* (CTV), *Hawaii Five-O* (Global), *S*! My Dad Says* (CTV) and *The Event* (Citytv).

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Wandering eyes

TV tackles viewer fragmentation

BY KATIE BAILEY

TV: It was the final frontier, the biggest and the baddest of all mediums. Families gathered around it, office water coolers were drenched in talk of it. But with YouTube churning out thousands of hours of content every day and individual episodes freely available online and via mobile, how is TV fighting to maintain its place as the king of mass media?



Above right: A sign of worlds colliding, William Shatner stars in *S*&! My Dad Says*, a show inspired by a Twitter feed.

Twelve hours prior to the writing of this article, two million viewers across Canada gathered in front of their TV sets, popcorn in hand, to say goodbye to one of the last cliffhanger-driven, "event" dramas in prime time. The day was May 23, and CTV was airing the series finale of *Lost*, a cinematic ender to six years of brow-furrowing plot turns and existential online debates.

As the show proceeded to its heavenly ending, the question arose: how many offbeat shows like *Lost* will continue to earn such loyal viewership in today's fractured media landscape?

Not so long ago, the 500-channel universe was TV's biggest threat. Today, that universe is the size of Pluto when compared with the galaxy of content offered online. Take YouTube: *Lost* was in its second season when YouTube launched, morphing from a simple video website to a content behemoth in which 24 hours of video are uploaded every minute. It's no longer just eyeballs stretched across too many channels that TV needs to worry about – it's the army of unlimited, on-demand entertainment options lined up outside its gate.

How does conventional TV compete in such a world? We're not at a tipping point yet, Canada's big four networks say. Joe and Jill Public still like to come home from work, flip on their 56-inch plasma, and watch *Two and a Half Men*. (Or the Leafs. Er, Canadiens). "Must-see TV" is still here; it's just more about sports and event-based

reality TV than it is about whether or not Ross and Rachel will get back together. And although 2009 was defined by economic turmoil, the 2010 upfront sales have seen healthy demand by clients and aggressive pricing by networks, with anticipated increases in the range of 4 to 6% as of press time, Canadian media buyers say.

During the *Lost* finale, many of the weapons that TV has up its sleeve were in evidence: behind-the-scenes interstitials featured show insiders telling stories from a big green TD Canada Trust chair, Hyundai's closed-captioning sponsorship came alive with in-the-know *Lost* jokes – "Make [the Elantra] one of your potential candidates" or "Fast enough to outrun a polar bear" – and the online world was watching and buzzing with official live chats and unofficial banter (e.g. Twitter: "The final message of *Lost*: dogs are awesome. #lostdfinale").

It united all things important to media and TV execs: engaged fans, big-brand integrations, online extensions and most importantly, millions of eyeballs glued to the tube. But shows like *Lost* don't come along every day and they are an increasingly rare species. So how are the major networks tackling this new war for viewers?

Cultivating content and the cross-platform experience is a trend that's speedily underway in Canada. The recent purchase of Canwest's TV assets by Shaw is a good example. It was a move



Above: CTV delved head-first into cross-platform content during the Olympics, and came out a winner.
Below: Debbie Travis's new prime-time show on CBC will feature crowd-sourced content.



the company says was made, in part, to own the content it will distribute across its platforms, including a newly beefed-up mobile division.

Another BDU/network, Rogers, has been making similar bold moves in the media world, launching a subscriber-only VOD service including seven former Canwest channels and three Corus channels. It also invested in American Michael Eisner's new media studio Vuguru last fall, with a minority stake in exchange for controlling the Canadian rights to the studio's web-based content, which it is currently putting to use with a cross-platform (Citytv.com, mobile) video initiative called Shorts in the City.

CTV, on the other hand, put it all on the line for the media extravaganza that was the 2010 Vancouver Winter Olympic Games. There were more than a few doubters prior to the Games who thought the network overpaid for the rights, but execs and media buyers were all smiles afterward, impressed by how the network nimbly stickhandled record audiences across its channels and platforms.

It's an experience that CTV will carry forward into regular prime time this fall, seeking to engage viewers across platforms through "additive content," explains Alon Marcovici, CTV's new VP of digital media, and former VP of digital media at the Olympic Broadcast Media Consortium.

"At its centre there's the show, but in various layers around it are the additional content, the live chats and the tweets, etc," he says. "As the two-screen experience becomes more ubiquitous, I think you'll see

that notion of additive content be something that grows."

The two-screen experience raises an obvious question: is an eyeball an eyeball, wherever it comes from? And if that's the new math, then how does TV generating so much more revenue than digital and online platforms still compute? It's a question of redefining audience share, says Leslie Sole, CEO, Rogers Media Television.

"Our view of [cross-platform entertainment] is that the number-one viewing opportunity is congregation, which means the night it runs on network TV in real time. Then for 21 days or so, you have a period of immediate aggregation. Congregation is the hot play, and aggregation is the catch-up play. The source of viewers is not as important as the total number of viewers we have in that 21-day window. That is what I believe the future marketing opportunities will look like. That's how I measure success."

Redefining how eyeballs are evaluated in the eyes of the advertiser is going to be key to that process, says Barb Williams, EVP content, Canwest, because right now, the television viewer is still king.

"The challenge we're having at the moment is the monetization of that viewer, the ability to successfully sell advertising is still very much focused on the main platform. Now that's changing, slowly, but it is changing, so I think we're all watching the evolution of that model. At the moment, we would probably prefer to have all of our viewers on television – that's where we make the most money. But that's not a realistic point of view – we have to be continuing to share our content around the other platforms, so it's a matter of educating advertisers as to the value of the viewer in other places."

The CBC is in a slightly different boat due to its status as a public broadcaster, says Kirstine Stewart, general manager, CBC Television. Due to its mandate to be accessible to all Canadians, they have to make sure all of the content they create is "platform agnostic."

"Even from the very beginning when a show or idea comes in the door, we're always asking – and we have for three or four years now – how will this play out? It's not just an 8 p.m.-on-Wednesday show – how is this going to reach people? How can we attract them across different platforms?"

"Visual content has so many interesting applications, on any kind of screen possible. So you have to figure out what is the best use for that particular type of screen and what kind of content is best enjoyed on that type of screen."

Stewart cites the launch of *Being Erica* in 2008 as an example. The network wanted to appeal to young, working females, so they pre-launched *Erica* as an original web series (without the show's stars) to start building an audience for it before it even began. In that sense, Stewart says, cross-platform and viewer fragmentation can be a blessing to TV programming, giving it a leg-up it might not have otherwise had.

Complementary content can't just be a straightforward extension of a broadcast property, says Joshua Dorsey, executive producer, *Bitchin' Kitchen*, which started as a web series and now airs on the Food Network.

"I think where people often go wrong with multi-platform rollouts is there's no personality attached to it and no voice, people don't get that feeling that they're getting true access," Dorsey says. "With

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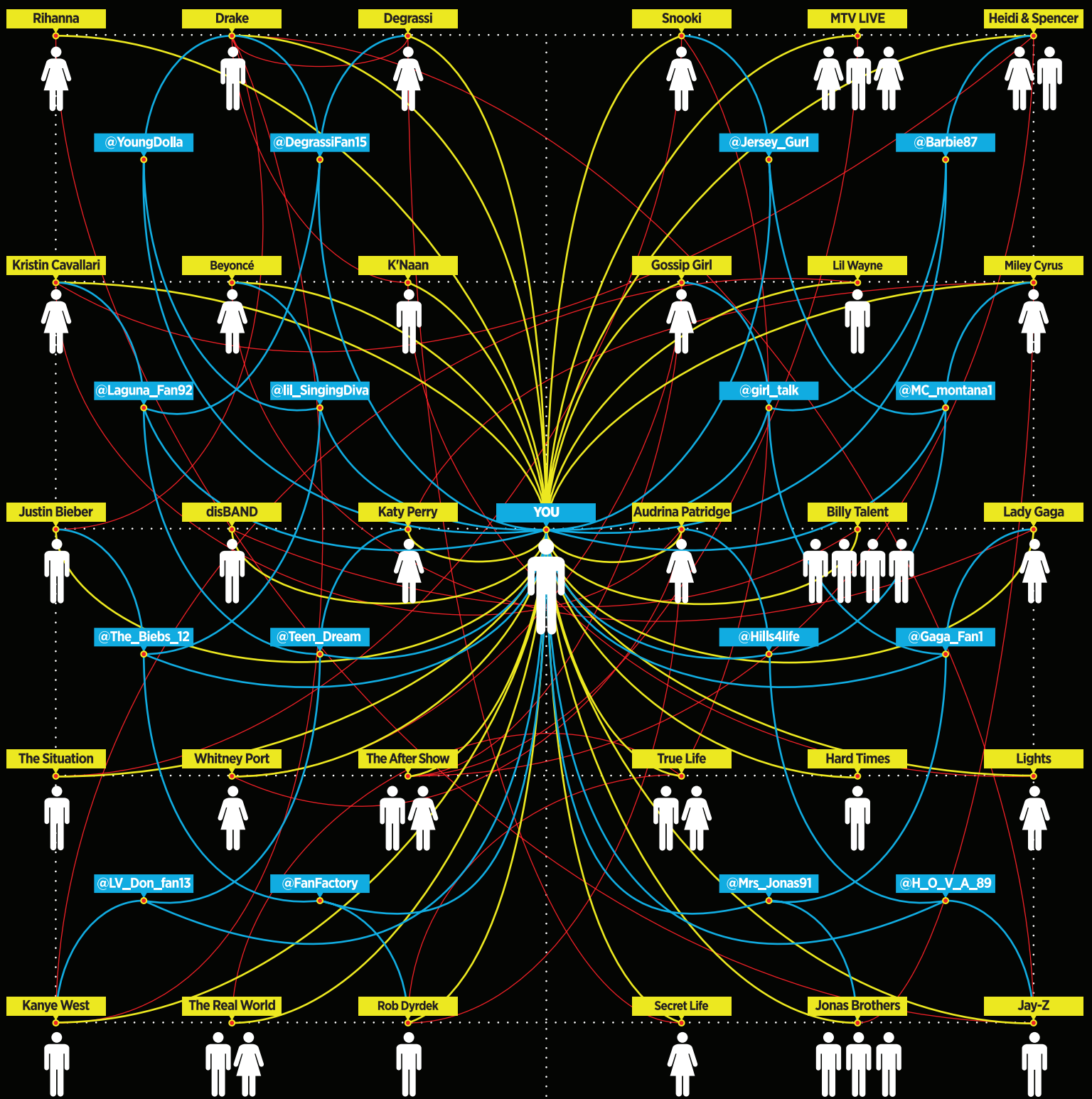
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JOIN THE CONVERSATION



Food Network Canada's *Bitchin' Kitchen*, starring bad-girl chef Nadia G, started out as an online series, building a fan base and generating social media buzz.

Bitchin' Kitchen, people know they can go online and ask Nadia questions and interact with her. That way, they're enjoying the show with everyone else and feel connected in a certain way."

Food Network was interested in *Bitchin' Kitchen* thanks to its young target demo, and part of the reason young people like it is that access, and the sense of community its online roots bred.

If TV is going to continue to thrive in a multi-platform world, Dorsey says, that will be a key aspect to it. (It would appear the Canadian Television Fund agrees: this year, it merged with the Canada New Media Fund, which mandates that interactive elements be a part of funded programming.)

There's no doubt there's a generational shift ahead. A recent ComScore survey of 1,800 American internet users found that 55% of 50- to

64-year-olds prefer to watch their programming live, as do 57% of over-64 year olds. However, when you look at the 18-to-24 and 25-to-34 demos, that number dips to 35%. The survey – which analyzed differences in viewing for originally scripted TV programming – found that of those who defined themselves as cross-platform viewers, 75% said they did so in order to watch TV "whenever they wanted." Sixty-seven percent (fourth-highest on the list) said they did so for "less interference from commercials." (With that said, the study's authors stated that "in many cases, online TV viewers actually have a higher tolerance for advertising messages than they are currently receiving.")

For TV to thrive in such a world, says Rogers' Sole, nets need to focus more closely on key demos.

"Television has to be very good at what it does, and not do too much, and to concentrate on the

Fall tv
2010

key viewers that we choose. We have a generational transformation right now, Xers are still hot, and the Y and Millennials are not going to drive their daddy's Oldsmobile. They want a different kind of comedy, they want a different social slant on it."

That tech-savvy generation's tendency to also watch this content when and where they want – some bypassing networks entirely – is a looming threat.

"Younger viewers would have no problem at all pulling the plug," says Max Berdowski, VP, business development, Interactive Ontario, adding that networks will have to find the "magic bullet" to monetize web content as the shift occurs.

In an interview with *Media in Canada* earlier this year, Cossette Media's VP of digital solutions, Nick Barbuto, said he got the sense that young people will soon view conventional television subscription the way they view landlines: unnecessary.

"I was talking with some young people recently about viewing television, and a lot of them who are getting their own places are not even subscribing to traditional cable anymore," he said. "It definitely feels like that transition point for people that grew up with cell phones and said 'Why do I need a landline anymore?' It feels like we're right at that crux again."

Curiously, the additive digital iterations the nets are now embracing may well be the piece that insulates their business model from the fate that befell record labels when young consumers migrated online – and the weight of that shift eventually tipped an industry when they chose to ignore it.

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New frontiers

Brands and nets explore social TV and integration 2.0

BY JONATHAN PAUL

Audiences love to be entertained. They surround themselves with screens – TV, online and mobile forming the holy trinity – to maximize their entertainment intake. Since the old-school 30-second spot doesn't always do it anymore, advertisers are looking for new ways to break through, and partnering with content more often, in novel ways. Social TV – combining people interacting online in real time with a live broadcast – is one new frontier being explored by brands and their broadcast partners.

CBC has entertained the notion with initiatives like the Chevrolet iDesk. The branded environment allows hockey fans to chat with each other and CBC sports personalities while watching a live game, as well as take part in polls, with results published online as the game goes on. The iDesk also features a 360° camera that viewers can use to watch the game, a concept that the CBC extended to Chevy's vehicles, allowing hockey fans to also check them out in 360° tours.

The CBC is building out its social TV capability further, starting last month with the FIFA World Cup and continuing with the Commonwealth Games and next hockey season.

"Social TV enables brands to be more relevant and meaningful to their target group," says Michka Mancini, director of digital, CBC. "This is accomplished through meeting the social needs of the customers' lives, which in turn creates a sustainable relationship and that's a great competitive advantage."

There's also a new bar being set in terms of advertiser ties to on-air content. Recently executed partnerships blazing trails to a brave new integrated world include CTV's program with TD Canada Trust that saw creative minds behind some of the net's hit shows get "Up Close and



Above: *American Idol* vocal coach Debra Byrd got "Up Close and Comfortable" in TD's trademark green chair. Below left: Doritos and MuchMusic's VJ 2.0 winner, Liz Trinnear, social-networked her way to the top.

Comfortable" with Canadians in the bank's trademark green chair. Led by Starcom, the multi-platform campaign revolved around a series of backstage and on-location video interviews where viewers were given the skinny on what happens behind the scenes of staples including *Grey's Anatomy*, *CSI* and *Desperate Housewives*. The segments, which were created in-house by CTV Brand Partnerships, launched on TV and CTV.ca.

It's not the first time TD has engaged in partnerships of that ilk. In September it worked with Mediacom to execute a similar program with the CBC where stars from the net's shows were featured in 30-second interview vignettes, again sitting in the bank's green chair. They were posted on a branded website hosting CBC's fall lineup.

TD's program integrations were also scripted into actual storylines of Ceeb shows. In *Being Erica*, for example, one character manages a TD Canada Trust branch and speaks at a TD corporate function.

"What was groundbreaking about it was that it was a campaign that really spread across the network and not just in promotional time," says Jamie Michaels, director of marketing for

brand integration, CBC. "It really went into the storylines of three of our prime-time shows with three unique messages."

The bar has definitely been raised beyond branded content alone. The Ceeb recently integrated a standalone branded content property into another show by incorporating *Kraft Hockeyville* into *Little Mosque on the Prairie*. The goal was to extend the evergreen *Hockey Night in Canada* property to a larger audience in what Michaels calls crossover integration. He says that it made sense because both shows revolve around small-town Canada. *Hockeyville* was the focus of an episode of *Little Mosque* in which the show's fictional town of Mercy entered a submission to become the next Kraft Hockeyville. The integration was extended online to the Hockeyville website, where the Mercy townsfolk had posted a fictional video submission.

"It was about how you create experiences around the brand rather than just taking what's on television and putting it online," says Mancini.

Of course, no need to completely reinvent the wheel (invented by Donald Trump) if creative tweaking will suffice. In a twist on the branded episode model, in June, CBC worked with OMD to put together a special green-themed episode of



Dragon's Den for SunChips, corresponding with the launch of the brand's new compostable bag. The episode provided \$100,000 to be divvied up between enterprising inventors with the best green inventions.

Broadcasters are also increasingly extending integration opportunities within hot TV properties to the web. Though it's not necessarily a new phenomenon, it's an area that they're building out more and more. Canwest, for example, is creating web content exclusively for its brand partners around two new TV shows set to premiere in the spring of 2011: *Wipeout Canada* and *Top Chef Canada*. Building on a program developed for *Project Runway Canada*, both shows will have a dedicated "preditor" (producer/editor) on-site filming customized web-exclusive content.

Online was the platform for the reinvention of MuchMusic's traditional VJ Search, a new step for the net resulting in a long-term execution that seamlessly flowed from TV to digital and vice versa. Its VJ 2.0 competition in partnership with Doritos took place between August and December to celebrate a new Collisions flavour, Habanero and Guacamole. Young Canadian hopefuls, eager to become the newest VJ, submitted about 4,000 entries.



The Chevrolet iDesk allows hockey fans to chat with CBC sports personalities while watching the game.

They had profiles set up on a branded Doritos VJ 2.0 website, featuring their video auditions, and had to leverage their social networks in order to build up a fan base and acquire feedback and ratings.

It was the first time that Much had ever embedded Facebook and Twitter feeds and YouTube channels onto its site, and contestants even took it upon themselves to brand their own Twitter feeds and Facebook pages with the Doritos VJ 2.0 logo and feature the product in YouTube videos. The competition was later incorporated into *MuchOnDemand* when it

reached the final phase. The program resulted in 600,000 unique visitors to the site and 27 million page views.

"Instead of the traditional VJ Search television show, we evolved it into a digital-led program with branded content airing on television throughout the entire run," says Dave Caporicci, director, brand partnerships and program marketing, Much MTV Group. "No waiting for weekly episodes, this program was living and breathing as a part of our demo's life, 24/7. Our TV VJ 2.0 branded content aired in all our top shows maximizing reach against our demo."

Much's sister net, MTV, has been experimenting with extending TV experiences even further afield via mobile platforms.

A program done with BlackBerry for the MTV Movie Awards in June spanned TV, online and BlackBerry Messenger (BBM). Awards-watchers could add MTV personality Johnny Hockin to their BBM contacts and then interact with him via SMS during live vignettes that aired during the show. The initiative was promoted via a web video ad that featured Hockin pointing to a pre-roll big box ad beside it, which prompted viewers to add him to their BBM contacts by snapping a pic of a bar code. It's social TV, brought to you, of course, by BlackBerry.

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Cross-country checkup

Who's ruling the dial in the big four markets

BY CHRIS POWELL

VANCOUVER

What's changed?

It's a familiar story: CTV landed an astonishing 15 of the top 20 shows in the 18-49 demo between Dec. 28 and May 13, the Vancouver Olympics accounting for four of the top five. They were augmented by expected ratings winners such as *The Amazing Race* and *American Idol*, as well as "Where did that come from?" hits like *The Big Bang Theory*.

CITV led the market with an 11.1 share among 2+ between Jan. 1 and May 16, followed by Global's CHAN with a 10.5 share and CBC with a 6.1 share.

But the season wasn't a total write-off for CITV rivals. Sheila Malanchuk, media/strategy manager for OMD Canada's Vancouver office, says CHAN had been "kind of sliding" in the ratings, but received a jolt from freshman shows *Glee* and *NCIS: Los Angeles*. They ranked 1-2 among first-year shows in the 18-49 demo, with *Glee* averaging a 6 rating and *NCIS: Los Angeles* a 3.7.

CHAN also continues to benefit from its strong supper-hour newscast – which "just annihilates everybody else in the market" says Malanchuk – while prime-time pillars like *Survivor* and *House* were top 20 shows in both the 2+ and 18-49 segments.

Citytv, meanwhile, remained a scrappy challenger thanks to rookie sitcoms *Modern Family* and *Cougar Town*, and reality stalwarts like *The Bachelor*.

What's next?

Buyers note that both CTV and Global have several aging franchises (*CSI*, *Desperate Housewives*, *House*, *Survivor*), although neither is in danger of sliding into obscurity just yet. While some of their staples won't be back next season (Global's *Heroes* and *24*; CTV's *Law & Order* chief among them), both retain several advertiser-friendly properties.

Malanchuk says Citytv made "very good steps" last season, and she hopes Rogers will be similarly aggressive when it comes to acquisitions this year. "We need another player that has a willingness to buy programming that's going to make an impact," she says.

Vancouver buyers are also curious about the direction Global will take under the stewardship of new owner Shaw Communications. "That's a key question: what are they going to do regarding new programming?" she says. "[Shaw] obviously has deep pockets, so it's really going to be curious to see what impact it has."

Malanchuk says Vancouver casters have remained hard-nosed on rates throughout the ongoing economic woes. "I foresee the stations being as aggressive as always," she says. "A lot of money has to be recouped, so that's where they're going to be starting from."



Best bets?

Malanchuk says Global's reboot of *Hawaii 5-0* could be "one of the season's real success stories," citing great chemistry between leads Alex O'Loughlin (*The Shield*) and Scott Caan (*Mercy*), and little competition in the 10 p.m. Monday timeslot. She also likes CTV's *No Ordinary Family*, which she describes as a cross between *Heroes* and *The Incredibles*, starring Michael Chiklis (*The Shield*). Its main rival in the Tuesday 8 p.m. slot is *Glee*, but Malanchuk says that show skews younger and female. "[*No Ordinary Family*] does have the potential to pull in young males, with no real competition in the time period," she says.

CALGARY

What's changed?

Susan Beck, VP media for local agency Mediactive, summarizes last season as "pretty standard," with CTV's CFCN and Global's CICT retaining their respective 1-2 positions.

In prime-time viewing, CFCN averaged a 12.5 share in the 18-49 demo between September and April, placing it ahead of CICT (8.1), CBC's CBRT (5.2) and City (3.3).

An abundance of big-event specials – highlighted by the Olympics, the Academy Awards and the Super Bowl – enabled CFCN to land nine of the top 10 programs. However, Global was a worthy challenger when it came to episodic, thanks to enduring faves like *Survivor*, *Family Guy* and *House*.

Beck is also enthused by Citytv's ongoing efforts to rejuvenate its prime time. "[*Modern Family* and *Cougar Town*] are not out-of-the-park rating hits...but they're certainly programs to build a schedule around," she says. "[City] has definitely upped its game on program acquisition."

However, she also noted that Rogers' decision to scrap City's noon, supper-hour and late-night newscasts in an effort to curb costs could hinder future efforts to strengthen its position.

What's next?

Conventional broadcasters continue to wage an aggressive battle on the digital front, with the overwhelming majority of their prime-time skeds now available online. However, Beck wonders if the strategy could compromise their TV ops – particularly given the discrepancy between ad rates and a lack of online ad opportunities.

"Once you've offered [viewers] that option, how do you take it away?" she says. "And how do you insert more commercials? It's difficult to put the genie back in the bottle."

Previously super-heated, Calgary's TV market has experienced a welcome cool-down in recent months. "Broadcasters were selling out inventory so far in advance, they were turning away business," says Beck. "A lot of people are moving away from TV at that point, because they can't get in. It was too hot and it wasn't good for anybody."

Best bets?

Florence Ng, president, broadcast/video investments for ZenithOptimedia in Toronto, also says that Global's *Hawaii 5-0* reboot should benefit from a favourable time slot (Monday at 10 p.m.) that has it squaring off against another rookie show, Citytv's *Chase*. Another Global newcomer, the drama *Lonestar* (Monday at 9 p.m.) will benefit from having *House* as its lead-in. Ng also predicts that *Law & Order: Los Angeles* (10 p.m. Wednesday), will be a hit for CTV. "Dick Wolf is the master in producing procedural dramas," she says. "It has good potential."

Clockwise from left: Best bets this season include Global's *Hawaii 5-0*, Citytv's *The Whole Truth*, CTV's *No Ordinary Family* and Radio Canada's *Les Rescapés*.



TORONTO

What's changed?

There was no significant shift in the rankings for Canada's largest TV market, with CTV's CFTO averaging a 13.8 prime-time share among 18-49 between Sept. 1 and April 26, followed by Global's CIII (7.3), CBC (6) and Citytv (5.5).

Canwest stopped programming its struggling E! channel last August (it's now operated by Channel Zero, with extensive local news and movies), yet its passing didn't really have an impact on the market.

"I didn't really spend a lot of money there because as far as I was concerned, it never really worked," says Carol Cummings, director of television services for Media Experts.

Cummings notes that TV viewing levels were consistent with previous years, leading her to conclude that broadcasters' online strategies are enticing new viewers rather than siphoning them away from core broadcast properties. She was caught off-guard by the success of last season's breakout hit *Glee* ("I thought it would appeal to a very small audience"), but notes that Global also made significant ratings headway with new dramas *NCIS: Los Angeles* and *The Good Wife*.

What's next?

Although the current gap between CTV and Global may appear insurmountable, Cummings predicts that the latter will continue to make headway by building on its younger-skewing sked – embodied by franchises like *Glee* and the Sunday night animation block.

She also expects Shaw to open up the vault when it comes to Global program acquisition. "I think they'll bring deeper pockets to Los Angeles, which will be good."

CTV's lineup continues to cater largely to the 25-54 crowd; while it contains a number of aging franchises, Cummings says it injected some youthful vigour with shows like *V*.

Although *Battle of the Blades* was a surprise hit for CBC, Cummings predicts the pubcaster will struggle to attract consistent interest in properties besides hockey. "That's the only reason I really spend money there," she says. "It's really difficult for anything else to pull a 1 rating."

Best bets?

Valerie McMorran, SVP, investment director for SMG in Toronto, says Citytv's new drama *The Whole Truth*, the latest from Jerry Bruckheimer, is a potential hit in the 10 p.m. Wednesday time slot. Star Rob Morrow (*N3mbers*) gives the show instant credibility, she says, while its premise – a legal drama that follows both the prosecution and the defence – is a welcome departure. "It's something outside of the typical franchise," says McMorran. She also says two new dramas – CTV's *Blue Bloods* and Global's *Outlaw* – could establish Friday as a new viewing night. "They're putting some high-quality dramas in this time period (10 p.m.) to try and spike up this night," says McMorran. "Saturday's kind of out, Friday's always been dismal, so [broadcasters] have really been relying on five nights of TV." The likely scenario, she says, is that one of the shows will ultimately sub-in for a failed mid-week program.

MONTREAL

What's changed?

After being rescued from bankruptcy protection by Montreal TV/film prodco and distributor Remstar in March 2008, TQS was relaunched last August as *V*. It wasn't a case of *V* for victory, however. The station finished a distant third among Francophone viewers 18-49, averaging an 8.7 share between September and April.

"It came in very strong and [Remstar] felt they had some great shows, but I don't think it really went anywhere," says Media Experts' Cummings, who questioned the wisdom of a Francophone station importing a boatload of U.S. programming (including *The Mentalist* and *Fringe*). "A lot of the U.S. dramas don't always go over well in Quebec," she explains. "They like local celebrities and homegrown humour."

On the basis of established audience faves like *Le Banquier* and *Occupation Double*, Quebecor-owned TVA was the runaway market leader with an average 23 share, followed by SRC Montreal (13.6).

What's next?

TVA has made few changes to a prime-time sked that leans heavily on older properties, but buyers aren't concerned. "It if isn't broken, why fix it?" says Line Contant, broadcast manager at Media Experts in Montreal. New additions for fall include sketch comedy show *Tranches de vie* and *Fidèles au poste* – a game show incorporating TVA footage from the past 50 years.

V, meanwhile, is "continuing its adjustment" under new owners. "They took a station that wasn't doing too well and made some changes, and did okay for the first year," says Contant. "They're not back where they were a couple of years ago in terms of audience, but they're working towards that."

In addition to new shows *Un Souper presque parfait* (a French-language version of popular U.K. series *Come Dine with Me*) and *Soirée de clowns*, *V* is also picking up several U.S. shows, including *Fringe*, *Lie to Me* and *Glee*.

Contant says online viewing isn't having a visible impact on conventional TV ratings in Montreal, but she expects this



year's launch of VOD website Tou.tv – with 2,000 hours of programming from several channels – could change viewing patterns.

"The younger generation uses Tou.tv as an alternative way of watching their TV shows," says Contant, who predicts it will take some time to achieve mass penetration online – and that viewers will consume shows online they wouldn't typically watch on TV.

Best bets?

The number two net, Radio-Canada, boasts two of the shows Contant is most enthused about, *Mauvais karma* and *Les Rescapés*. The latter, starring Roy Dupuis, follows a 1960s family that is transported to modern-day Canada. *Mauvais karma* is about three friends whose girlhood dreams never came true, but when fate reunites them after 18 years, they turn to each other for support. The sitcom is written by Isabelle Langlois, whose show *Rumeurs* did well on SRC.

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The **specialty** hot list

BY CHRIS POWELL

Putting the word “hot” before something confers elevated status or prestige.

Why have a boring old email account when you can have Hotmail?

Who wants a regular deal when there are hot ones to be had?

And would you rather read a regular list, or a hot list?

While there is a specialty channel out there for pretty much every interest group imaginable, an informal poll of key media buyers helped us determine which are currently “hottest” on the basis of programming, audience growth, smart reinvention and nifty ad formats.

The resulting list is a snapshot of the current TVscape, but it’s important to note that “hot” is a transitory state. After all, science not only tells us that heat rises, but what goes up, must come down. So here’s the buzz on some of Canada’s top women, youth, men and boomer destinations, and intel on the new shows aiming to keep them there.

Top picks for **WOMEN**

W NETWORK

AMA: 63,000 (2+); 19,000 (W25-54)

Buzz: Averaging more than 10 million viewers a month, “W totally dominates the women segment,” says Florence Ng, president, broadcast/video investments for ZenithOptimedia in Toronto. W also offers insight into women through its proprietary W Her Report – a blind panel of 2,500 women aged 18-70.

The channel will undergo a significant makeover this fall, moving away from focusing solely on beauty and transformation and adopting a lineup designed for broader audience appeal. This will be reflected in nine new prime-time series.

New for fall

Inside the Box With Ty Pennington

American design expert Ty Pennington brings his expertise to Canada in a new series pitting so-called “armchair designers” against each other. Produced by Cineflix Productions in association with W, each 30-minute episode features two amateur designers competing to create a themed room for their home. The catch is that they can only use items contained in a mystery crate – all selected by Pennington based on his understanding of each competitor’s style. Canadian designer Janette Ewen also stars.

Come Dine With Me Canada

Based on the popular Brit series, *Come Dine With Me Canada* follows five amateur chefs as they compete for the title of ultimate host, and a cash prize. Over the course of a week, each hosts a dinner that is scored by their rivals on such factors as cocktails, menu, entertainment and ambience. Produced by Proper Television in association with W, the series debuts in November.

Restaurant in our Living Room

In each one-hour ep of this eight-part U.K. reality series, two couples are given three days and £500 to create a restaurant in their home. Diners are

Above left: W Network’s *Inside the Box With Ty Pennington* sees amateur designers competing to create a themed room.

Falltv 2010

then asked to pay what they think the meal is worth, and the couple that makes the most money gets to eat at one of the world's top restaurants.

SLICE

AMA: 27,700 (2+); 16,300 (A25-54); 15,800 (A18-49); 10,900 (W18-49)

Buzz: The former Life Network has been rejuvenated since relaunching as Slice in 2007. Its growing appeal is reflected in a 39.9% increase in ad revenues between 2007 and 2009 (from \$18.3 million to \$25.6 million). The channel also achieved a 27% increase in AMA among adults 25-54 in Winter/Spring 2010 over the year-earlier period, and a 21% increase among women 25-54.

"When it launched it was not delivering as per projections, but with the programming changes they're making inroads," says Ng. "It's doing good numbers. Their program selection has a slightly younger skew and I think they've been doing a good job in that area." Buyers also applaud the channel's mix of smart, engaging programming like the *Real Housewives* series, *Til Debt Do Us Part* and *Project Runway*.

New for fall

Princess

Starring *Til Debt Do Us Part* host Gail Vaz-Oxlade, this 13-part series focuses on young women who are living way beyond their means and accumulating huge credit card debt. Throughout the hour-long episodes, Vaz-Oxlade firmly guides participants through a series of challenges aimed at transforming them from princesses into self-sufficient young women.



Food Network's *Top Chef: Washington* features a guest appearance by White House chef Sam Kass.

HGTV

AMA: 75,700 (2+); 39,100 (A25-54); 25,100 (W25-54)

Buzz: HGTV is the second-ranked specialty among women 25-54, with its AMA for Winter/Spring 2010 up 30% over last year. It's also ranked fourth against women 18-49 and fifth against adults 25-54.

Media buyers applaud Canwest's willingness to embrace out-of-the-box ad opportunities. "It's good when a station is open to work with a client to do product integration or put together something unique like a sponsorship," says Sheila Malanchuk, media/strategy manager for OMD Vancouver.

New for fall

My First Sale

Buying that first home is tough, but selling it is

tougher. This half-hour series follows homeowners selling their first abode, providing tips to help them.

Battle on the Block

A character-driven home makeover show (eight half-hours) pits three neighbouring families in a battle to design and build a new room from scratch – in just one weekend. Winners receive \$10,000.

Selling New York

This 30-minute show follows agents from Manhattan brokerages as they make their way through the cutthroat real estate world, rubbing shoulders with the city's richest denizens.

Home to Keep

Popular HGTV personality Peter Fallico is back in a new half-hour series, helping homeowners transform wasted space into functional rooms.

SPECIALTY EVOLUTION

BY EMILY WEXLER

Channels, like children, often grow up and change, becoming almost unrecognizable versions of their former selves. Here are a few that have gone the way of the butterfly.



MTV first sprang up in Canada as a relaunch of a youth-focused channel called Connect under Craig Broadcasting. In 2001 it became MTV Canada, but CHUM filed a complaint to the CRTC that it was stepping on MuchMusic's musical toes. When CHUM purchased Craig's TV assets in 2004, the channel was rebranded again as Razer (now MTV2). The current version of MTV Canada was originally Talktv – home to shows like *The Chatroom* and new fresh-faced personalities like Seamus O'Regan and Ben Mulroney. Relunched as the teen juggernaut in 2006, the CTVglobemedia channel kept talking, only now the chatter is mostly about Heidi and Spencer.



I scream, you scream, we all scream for a wider audience, which is why Corus's Scream TV was rebranded as Dusk last year. By focusing away from horror and gore and towards suspense and good-looking actors (hello, *Supernatural*), Corus wanted to get women's hearts pounding too.

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FOOD NETWORK

AMA: 55,600 (2+); 26,800 (A25-54); 28,200 (A25-54); 28,200 (A18-49); 14,500 (W18-49)

Buzz: "Food is doing very well," says ZenithOptimedia's Ng. "And it's not just women – it's adult focused. Food appeals to everybody."

In the past year, it experienced 28% growth against adults 18-49 and 21% growth against women 18-49.

The Specialty Engagement Study conducted by Toronto's Solutions Research Group confirmed that it's the favourite specialty of women 25-54 and the third fave among adults 25-54. With a subscriber base topping 7.4 million and more than six million viewers each week, its AMA puts it among the top 10 specialties for several demos, including adults 18-49, women 18-49, adults 18-34 and women 18-34.

New for fall

Top Chef: Washington

The latest instalment of the popular chef wars format takes place in the U.S. capital, and features guest appearances by Buzz Aldrin, White House chef Sam Kass and CIA director Leon Panetta. Over the 19 episodes, participants face some of the most creative challenges the series has dished up – like taking over the concession stands at the home of Major League Baseball's Washington Nationals, heading inside CIA HQ and taking direction from a NASA astronaut orbiting Earth.

The Opener

This 19-parter follows celebrity chef and restaurant consultant David Adgey as he walks aspiring restaurateurs through the steps necessary to create their own restaurant. Over the course of each hour-long ep, Adgey blends tough love and unorthodox methods to get entrepreneurs' dreams off the ground.

Dinner Party Wars

This 13-ep series features three couples going head-to-head in a no-holds-barred dinner party competition. Each couple is judged by expert chef Corbin Tomaszewski and event planner Anthea Turner, who will rate their food and ambience.

Private Chefs of Beverly Hills

This six-part docu-soap follows chefs from an elite private-chef placement agency. On call around the clock, these chefs cater to the whims of eccentric clientele in Hollywood's swankiest 'hood.

Jamie's American Road Trip

Jamie Oliver sets off down America's back roads in search of real food. Premiering in November, each one-hour episode of the six-parter follows the celeb chef as he encounters real cooks making delicious food at street stalls and off-road diners.

Top picks for YOUTH

YTV

AMA: 122,000 (2+); 39,000 (2-11); 29,000 (W18-49)

Buzz: Ng says Canada's first youth channel has remained attractive to advertisers because of its ability to attract shared parent/child viewing. "It has helped maintain the audience delivery," she says.

"You tend to think of YTV as [catering to] moms and kids," adds Valerie McMorran, SVP, investment director for SMG in Toronto, noting that shows like *SpongeBob SquarePants* make it a beacon for the younger set.

YTV has been researching the co-viewing trend for the past five years, finding it can increase ad recall by up to three times and there's increased conversation about programs and commercials. Seen in over 10.5 million homes and reaching an estimated 2.2 million kids each month, YTV features hosted day-parts along with kid-targeted and co-viewing blocks that include after-school block The Zone, the Saturday morning toon block Crunch, and the Sunday movies block Zapx.

New for fall

Victorious

This live-action comedy from Nickelodeon follows the journey of a 15-year-old girl growing up in the shadow of her older sister – the "star" of the family. A fluke accident lands her at the prestigious Hollywood Arts high school, where she discovers getting in is easier than fitting in.

Big Time Rush

Four best friends from Minnesota

suddenly find themselves part of the L.A. music scene, attempting to become the next big boy band. Produced by Nickelodeon in partnership with Sony Music, each half-hour live-action episode features original songs performed by the "band."

Sidekick

A young orphan living in an animated world filled with heroes and villains is about to begin his new role as a sidekick for the world's greatest superhero, Maxum Man, when his would-be boss disappears. The series, produced in Canada by Nelvana Studio, follows his antics at Splittsboro Sidekick Academy.

MUCHMUSIC

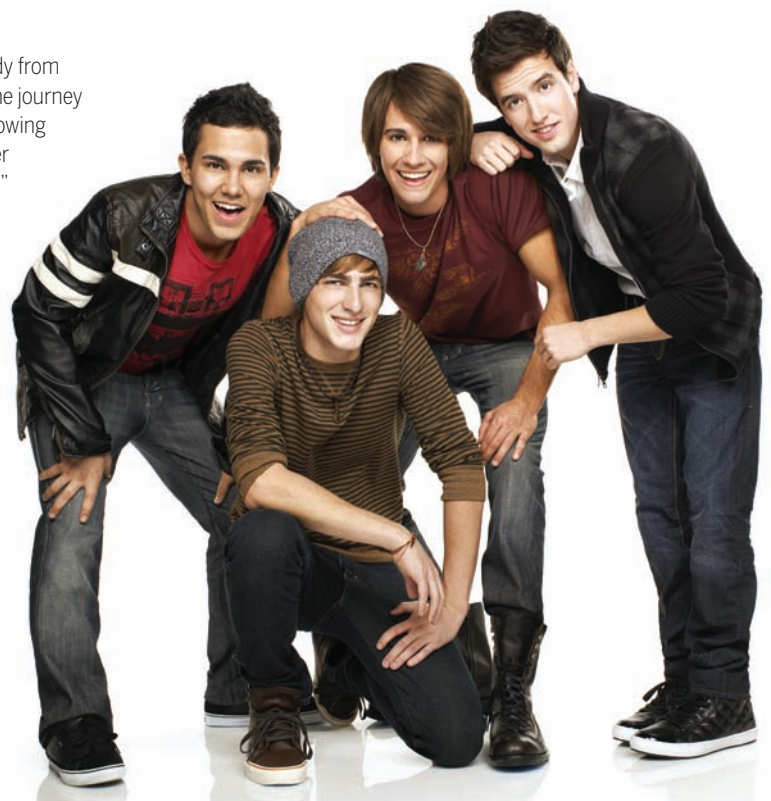
AMA: 32,100 (2+); 17,000 (12-34)

Buzz: A charter member of Canada's specialty TV club, Much has evolved from its beginnings as a video network to a full-fledged channel. ZenithOptimedia's Ng says it found success by repurposing network shows like *So You Think You Can Dance*, enabling them to reach a younger audience. "It gives people another chance to watch a show that they missed...and at the same time it brings a fresh audience. It's always easier to target the older demo [but] it's the younger viewers we have a much tougher time getting our hands on."

New for fall

Price of Beauty

This new series, airing Thursdays at 8 p.m., follows Jessica Simpson as she travels around the world



Four best friends leave Minnesota and their exams behind, working to become L.A.'s next big boy band in YTV's *Big Time Rush*.

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meeting everyday women and local pop culture icons. Simpson examines local fashions, diets and beauty regimes.

Pants Off, Dance Off

This 30-minute show features average Canadians dancing to their favourite music video. There's a twist, however: they must strip while doing it. A phenomenon that has swept through the U.S. and the U.K., it is now making its way to Canada.

TELETOON

AMA: 41,700 (K2-11); 57,300 (A18-49)

Buzz: SMG's McMorran says Teletoon has carved out a niche between younger-focused YTV and teen/young adult-skewing stations like MTV Canada. "It's well distinguished from YTV, which tends to be families and the 6-11 age group," she says. While kids 2-11 comprise an estimated 43% of the audience, for early evening fare such as *Star Wars: The Clone Wars* and *6Teen*, tweens and teens comprise 17% of the viewers.

The animation station's first foray into live-action features is movie of the week *My Babysitter's a Vampire*, which will be the basis of a 13-part series for Fall 2011. And it continues to make inroads with older viewers: the Teletoon at Night block has propelled it to fourth-ranked non-sports specialty against adults 18-49 on weeknights, up from 12th last year, while the Superfan Fridays block makes it the second-ranked non-sports specialty, up from eighth.

New for fall

Skatoony

Adapted from the U.K. series of the same name, this *Hollywood Squares*-inspired quiz show combines real-life kids with an assortment of well-known animated characters from other Teletoon



Teletoon's *Skatoony* is a *Hollywood Squares*-style quiz show featuring the net's cartoon characters.

shows. Produced by Toronto-based Marblemedia, the show will be complemented by an online multi-player game at Teletoon.com, where kids will be able to play each other in real-time. The site lets kids customize their own character and the *Skatoony* game show environment, and view bonus video content.

The Avengers: Earth's Mightiest Heroes

This 26-episode series follows superheroes like Iron Man, Captain America and Thor as they band together to protect the planet from the likes of super villains, alien invaders and mad robots.

MTV CANADA

AMA: 16,700 (2+); 11,200 (12-34)

Buzz: Not only one of the world's most famous media brands, MTV has remained relevant to youth – and the advertisers that covet them – through robust deployment of online and social

media tools. SMG's McMorran describes it as the embodiment of a 21st-century broadcaster.

"They get that when they do integrated initiatives, they have to be multi-platform in scope and scale," she says. During the recent *MTV Movie Awards*, a marketing partnership with BlackBerry saw the show's Canadian host Johnny Hockin chat with fans using the BlackBerry Messenger service.

The channel's core broadcast business also continues to thrive. While U.S. ratings for the *MTV Movie Awards* were down 13%, MTV Canada garnered its largest audience ever with nearly one million people catching all or some of the awards.

New for fall

World of Jenks

Premiering Sept. 25, this series follows documentary filmmaker Andrew Jenks (*Room 335*)



Airing shows about gardening and cooking before HGTV and Food Network sprang up, Canwest's Life network quickly shifted to shows about, well, life, such as reality series and talk shows. Relaunched as Slice in 2007, the network set out to entertain with shows like *ET Canada* and the *Real Housewives* series. Insert "slice of life" joke here.



Based on the Citytv show of the same name, CHUM launched SexTV in 2001, a channel devoted to love, dating and, of course, sex. When CTvglobemedia (formerly Bell Globemedia) purchased CHUM and then sold SexTV to Corus, it was rebranded as W Movies, a sister movie station to the W Network. Ah, the perils of switching partners – some will try to change you.



Another channel caught up in the CHUM/CTV/Corus sale was Drive-In Classics, which aired B movies from the '50s to '70s and series like *Xena: Warrior Princess*. Rebranded as the Sundance Channel this past March, it offers up films, docs and original series that will make you sound cultured at dinner parties. But what will our hermit cousin who lives in the basement watch now?

as he shadows a stranger. Throughout each one-hour episode, Jenks explores the person's life and interacts with their family and friends – while the camera records every moment.

Bridge & Tunnel

Airing Tuesdays at 10:30 p.m., this reality series follows a group of high school grads from New York's oft-maligned borough of Staten Island as they pursue their dream of making it to Manhattan.

Top picks for MEN

ROGERS SPORTSNET

AMA: 112,000 (2+), 49,000 (A25-54), 31,000 (M25-54)

Buzz: Thanks to its four regional channels, Sportsnet is a leader in hometown sports coverage. The channel saw significant audience increases in several of its biggest properties last year, ranging from a 96% jump for Toronto Maple Leafs telecasts to a 10% increase for Edmonton Oilers telecasts.

In Vancouver, Sportsnet was the fourth-rated channel (conventional or specialty) among people 2+ between January and May, beating City, A Channel and OMNI B.C. Its Canucks telecasts are a fixture in the weekly top 10, garnering anywhere from an 8-10 rating according to OMD Vancouver's Malanchuk.

New for fall

UFC Preliminaries

As part of its strategy to be Canada's leader in mixed martial arts programming, Sportsnet has secured exclusive Canadian rights to preliminary bouts for the Ultimate Fighting Championships' pay-per-view cards. The network also holds exclusive broadcast rights to UFC Live, which features bouts not carried on pay-per-view.

Barclay's Premier League

Sportsnet has signed a new three-year deal to broadcast Barclay's Premier League soccer matches. The network will show two matches a week, accompanied by the country's leading soccer magazine show, *Soccercentral*.

MLB Playoffs

Sportsnet will cover the entire MLB post-season, from the Divisional series right through the World Series. Among adults 25-54, AMAs for the 2009 Divisional series were up 36% over the previous season (131,000), while World Series viewing was up 50% to 265,000.

NFL

Sportsnet has inked a new three-year deal with the National Football League, giving it broadcast rights to two 4 p.m. games on Sunday. With an AMA of 159,000 among adults 25-54, Sunday afternoon NFL games were up 119% over the previous year.



Sportsnet will also carry eight Thursday night games beginning in November.

TSN

AMA: 580,000 (2+)

The buzz: It's an irrefutable fact: men watch a lot of sports. And as TSN continues to bring it male-audience-wise, advertisers follow suit: while national ad revenue for Canada's 180 pay, PPV, VOD and specialty services decreased by 2.4%, TSN's revenues increased 4.5% to \$98.5 million.

Interestingly, the introduction of BBM Canada's new PPM measurement technology has shown an increased number of women watching as well.

"They're showing a lot more female viewers than we're used to seeing," says Carol Cummings, director of television services for Media Experts in Toronto. "Whether they're sitting watching with their husband or boyfriend, or doing something else, nobody knows."

TSN will televise more than 70 regular season NHL games this season (all featuring at least one Canadian team), and once again, all 77 CFL games – including the playoffs and the Grey Cup – will be carried on TSN.

New for fall

Into the Wind – A Film by Steve Nash

Canadian NBA star Steve Nash makes his filmmaking debut with this documentary about Canadian icon Terry Fox. The film chronicles Fox's journey from anonymity to national hero during his Marathon of Hope.

IIHF World Junior Championship

A holiday hockey tradition, this year's championship will take place in Buffalo, N.Y. TSN will carry all of Team Canada's games.

THE SCORE

AMA: 33,375 (2+)

The buzz: Like an up-and-coming rookie, The Score is pushing established veterans like TSN and Sportsnet – particularly among young male viewers. The AMA for its core audience, males 18-34, is up 70% over last year, while 2+ audiences are up 50%.

It is also highly active in the digital space. Its ScoreMobile app was recently named one of the top 20 free BlackBerry apps by *PC Magazine*, and it is introducing ScoreMobile FC – which will provide comprehensive stats, standings and scores for more than 50 international soccer leagues from more than 15 countries. Also new is



The West certainly didn't win this battle when Lonestar, originally launched in 2001, started to shift its programming from gunslingers to action stars. By the time Canwest rebranded the channel as MovieTime in 2008, action and adventure movies already made up the majority of programming, sending Lonestar fans off into the sunset.



In 2008, Country got Bold as the CBC ditched the rural roots of the channel that launched in 2001. Originally a joint venture with Corus, which sold its interest to CBC in 2002, the channel slowly started to shift its content from everything rural Canadian to more cosmopolitan and globe-trotting programming like *The Tudors* and World Cup soccer. After all, there are only so many shows about Alberta farmland...

The Score on iPad – which will bring iPad users the best of TheScore.com's blogs, original videos and data "powered by" ScoreMobile.

Buyers like the fact that it skews slightly younger than its rivals and is an affordable alternative. "They certainly have the ability to offer a more cost-effective option," says Malanchuk, "You can do much more, whether it's just a simple local integration or something more major."

New for fall

Serie A Italian Championship Soccer

The world-famous Italian Calcio professional league is new to The Score's program roster this fall. In addition to full games, highlights and league news will be available on the TV property, ScoreMobile and TheScore.com.

Gillette Drafted 2:

The Search for Canada's Next Sportscaster

This reality series developed with P&G follows a group of aspiring sportscasters as they attempt to land a gig with Score Media, contributing to The Score, TheScore.com and ScoreMobile. For 2010, the eight-minute segments of season one will grow to half-hour eps.

WEC: World Extreme Cagefighting

The Score signed a multiplatform deal with WEC, one of the world's largest mixed martial arts organizations, that will see it carry seven live WEC fights as well as online content.

Top picks for BOOMERS

BRAVO

AMA: 33,700 (2+); 11,900 (adults 25-54)

Buzz: With more than 7.02 million subscribers, Bravo is the spot for Canadian boomers. The channel caters to adults 25-54, with a slight female skew. While buyers say audience numbers have declined slightly since PPM was introduced, ZenithOptimedia's Ng attributes the decline to the fact that Bravo programs tend to be watched solo. "Most of the shows that Bravo carries are the ones that [individual] people will watch; it's less about family viewing," she says.

New for fall

Criminal Minds (Seasons 1-4)

The Emmy-nominated drama about elite FBI profilers will air Monday to Thursday at 6 p.m., so fans of Mandy Patinkin and Joe Mantegna can get a daily dose of disturbed criminal psyche-probing.



Mike Wolfe and Frank Fritz give new life to old junk in History's *American Pickers*.

Da Vinci's Inquest (Seasons 1-7)

One of Canada's longest-running dramas – wherein Nicholas Campbell, Donnelly Rhodes and Gwyneth Walsh portray Vancouver coroners and detectives solving mysterious deaths – will now be served up from Monday to Friday at 7 p.m.

Great Canadian Books

Saturdays at 8:30 p.m., Canadian personalities like Mary Walsh, Rex Murphy and Justin Trudeau review their favourite Canadian novel. The 13-episode series also highlights animation and art related to the literature. Among the highlighted novels are *Fugitive Pieces* and *Late Nights on Air*.

HISTORY

AMA: 90,200 (2+); 40,900 (A25-54); 16,300 (W25-54)

Buzz: The number four rated specialty channel against adults 25-54, History continues to grow its audience against several key demos. Shows like *Pawn Stars* are leading women to discover the channel themselves rather than as a result of co-viewing – making it the number seven channel against women 25-54.

"They have a lot more variety [in the schedule]," says Ng. "If you go back a couple of years, they were all about war movies." More syndicated programming, she says, has not only boosted audience numbers, but has helped the channel skew slightly younger.

History offers innovative ad formats, including exclusive sponsored events and programming blocks, in-show promotional bugs and customized content opps. This spring, for example, History partnered with Harley Davidson on a series of customized "This day in history" vignettes. Each 15-second spot juxtaposed a significant event in the motorcycle maker's history – such as the 1925 introduction of the iconic tear drop gas tank – with current "events" like "Rene gets new V-Rod Muscle Motorcycle."

New for fall

American Pickers

Mike Wolfe and Frank Fritz recycle America – one piece of "junk" at a time. Each hour-long ep sees the duo brave piles of grimy junk and shotgun-wielding home owners to salvage forgotten relics.

William Shatner's Weird or What

The former Captain Kirk boldly goes where no (okay some) TV host has gone before, investigating all that's weird in the world. Each one-hour episode sees Shatner try to find logical explanations for everything from paranormal phenomena to medical oddities.

Nazi Hunters

The six-part series follows real-life Nazi hunters as they relate their pursuit of notorious war criminals. Stories include tracking Klaus Barbie in Bolivia, and the audacious Mossad operation to kidnap Adolf Eichmann in Buenos Aires.

THE DISCOVERY CHANNEL

AMA: 7-11 p.m., 181,400 (2+); 89,300 (A25-54); 89,700 (A18-49) 2 a.m.-2 a.m., 91,800 (2+); 46,600 (A18-49); 44,100 (A25-54)

Buzz: With four consecutive years of subscriber growth – it reached the 8 million mark in 2009 – and \$39.6 million in annual ad revenues, The Discovery Channel is a fixture among Canada's top specialties. It got there by cleverly promoting homegrown programming such as *Canada's Worst Driver* and *Canada's Worst Handyman*, coupled with anchor event programming like Shark Week. Marketers can also attach themselves to programming through custom-created initiatives, such as ice cream bar Klondike's "Klondike Shark Adventure" contest around Shark Week – which asks participants "What would you do for a Klondike shark adventure?" – and Canadian Tire's sponsorship around *Canada's Worst Handyman* called "Frat House Frenzy."

Elsewhere, Discovery's revamped website now offers full episodes of several shows, plus bonus videos, enhanced TV listings and desktop widgets.

New for fall

Worst-Case Scenario

Based on the best-selling books of the same name, this 12-part series features host Bear Grylls (*Man vs. Wild*) demonstrating how to survive potentially life-threatening situations. Each half hour, Grylls will show how knowledge and skills can help anyone escape a high-rise apartment fire or fend off a shark attack.

Breakout

Premiering Wed., Nov. 13, this eight-episode series highlights some of the most audacious jailbreaks in history. Each hour follows escaped convicts and the lawmen chasing them.

Top picks for FRENCH

RDS

AMA: 6-11p.m., 285,000 (2+)

Buzz: RDS was Montreal's third most-watched channel – either specialty or conventional – this spring, with an AMA of 93,600 among viewers 2+; 37,100 among adults 18-49, and 39,000 among adults 25-54 – all buoyed by the Montreal Canadiens' unlikely playoff run. "It's number one against male and even some female demos," says Line Contant, broadcast manager for Media Experts in Montreal. For the year, RDS garnered nine of the top 10 and 14 of the top 20 specialty programs against viewers 2+. The channel is also home to all four Grand Slam tennis tournaments, more than 30 PGA Tour events and NFL football. The channel has augmented its broadcast offering with mobile apps, live webcasting and a social network on RDS.ca.

New for fall

NHL Hockey

RDS will carry all 82 Montreal Canadiens games in high-def, along with 30 other National Hockey League match-ups. Notable games include the 2011 Heritage Classic outdoor game, taking place at Calgary's McMahon Stadium on Feb. 20, which sees the Canadiens face the hometown Flames.

CFL Football

RDS will carry all of the Montreal Alouettes' regular season and playoff games, as well as the 2010 Grey Cup.

SÉRIES+

AMA: 44,500 (2+); 14,300 (A18-49); 15,700 (A25-54)

Buzz: SMG's McMorran calls Series+ "a mainstay" against Francophone women, thanks to a schedule comprised of original series augmented by U.S. imports like *Bones* and *CSI: Miami*. "Viewers tend to be attracted to the station and it's performing well," she says. Women 25-54 spend an average of 3.1 hours per week with the channel, equaling the time spent with conventional network V.

Meanwhile, its website averaged 120,000 unique visitors a month in the most recent quarter, a 155% increase over the previous year.

New for fall

Les Oubliés (The Forgotten)

They've picked up the U.S. series starring Christian Slater as an ex-cop who heads a victims' rights group committed to uncovering the stories behind the unidentified remains that turn up in America.

Malenfant

Debuting in Spring 2011, this miniseries features Luc Picard in the lead role of Raymond Malenfant, the Quebec businessman who built a hotel empire only to see it crumble and wind up facing fraud charges from the provincial government.

VRAK

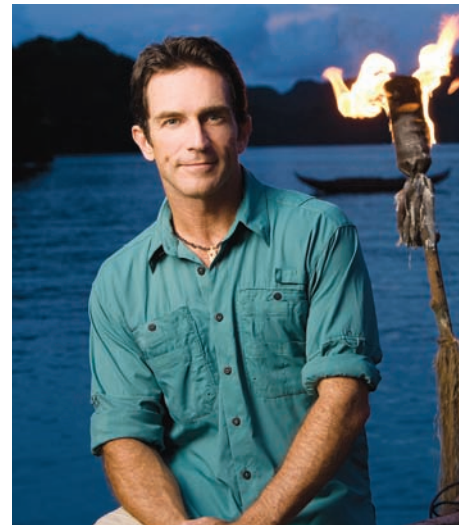
AMA: 31,100 (2+); 13,000 (A18-49); 10,300 (A25-54)

Buzz: The youth-oriented specialty channel reaches an estimated 73% of Quebec's nine- to 14-year-olds each week. Buyers are especially enthused by the upcoming introduction of a new live programming block. "That will be a great opportunity for advertisers to introduce integrated content," says McMorran. The channel is also revamping its website, which currently reaches 86,000 people each month, to incorporate more programming. "That multi-platform TV and online [component] is so important in that age group," says McMorran.

New for fall

R'garde-moi quand j'te parle

A hybrid TV-radio show between VRAK and the NRJ radio network, *R'garde-moi quand j'te parle* will be hosted by NRJ DJ and host Julie St-Pierre and actor François Bernier, who starred in VRAK's *Frank vs. Girard*. The half-hour show will air nightly at 7:30 p.m. beginning Aug. 27.



THE NEXT SPECIALTY STAR

BY EMILY WEXLER

Will the next specialty channel be green? Or perhaps it will be about healthy eating. Sure, cultural trends dictate what pops up on our digital box, but when it comes to determining what subject will get the specialty treatment, it has to have more than that "now" factor.

"A number of things have to come together – you have to really believe that the trend has longevity, that it's not just a flash in the pan," says Barb Williams, EVP content at Canwest Broadcasting, citing last year's recession-fuelled belief that people will change consumption habits and forgo expensive purchases. Once money was back in pockets, that trend faded, but there are others that Canwest is keeping an eye on for the future.

"We're watching people try to regroup a little and understand healthier living, more balanced living and greener living," Williams says.

One trend that has stood the test of time is reality TV. Blame it on our voyeuristic tendencies or secret desires for 15 minutes of fame, but people can't get enough of reality, so Canwest created an entire channel of it. Launched on July 1, Global Reality features old favourites, like the first season of *Survivor*, and new-to-Canada imports like *Apprentice U.K.*

"It was obvious for us given our strength in the genre, and given what we see to be continuing viewer interest in it – that's one way you come to a decision of, okay, there's a channel there," Williams says.

"You have to be sure that you've got an idea that's big enough [to] sustain as a business, but niche enough that it makes sense to that slice of audience you're after. There are still lots of opportunity to continue to launch channels that can be successful if you just find the right thing."

Handicapping the shows

A look at what's going head-to-head on the nets' new schedules

CBC

BY KATIE BAILEY

Men with Brooms Mondays 8:30-9 p.m.

Based on the movie of the same name, this Paul Gross-produced comedy follows a group of small-town friends and their follies at the local curling rink. This show has potential *Corner Gas* appeal – and curling is more popular here than in any other country in the world – but it will have a tough time in its Monday timeslot, going up against *House* on Global and *Dancing with the Stars* on CTV.

All For One with Debbie Travis Sundays 9-10 p.m.

Once one of HGTV's DIY queens, Debbie Travis has found a new home on CBC prime time. Leaving her decorating roots behind, Travis's new show will profile average Canadians who have led inspiring or extraordinary lives. The twist? Crowd-sourced content: Canadians were invited to submit their nominations for the "unsung heroes" they think are worthy of recognition. With only eight episodes, a demographically uncompetitive timeslot and a boost from CBC's *Battle of the Blades* at 8 p.m., this show should fare well for the network.

CITYTV

BY EMILY WEXLER

The Event (NBC) Mondays 9-10 p.m.

Set to fill the void left by *Lost* and *24*, at least according to Rogers EVP programming Malcolm Dunlop, *The Event* is a conspiracy thriller starring Jason Ritter (son

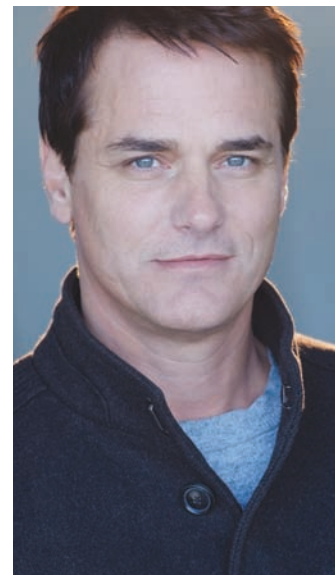


Above: starring Boris Kodjoe, *Undercovers* brings the sexy to Citytv's schedule.
Below right: Paul Gross-produced *Men With Brooms* sweeps curling into prime time.

of the late John Ritter). He plays a man looking for his missing fiancée who unearths a massive U.S. government cover-up. Also starring Blair Underwood (*The New Adventures of Old Christine*) as the President, Laura Innes (*ER*) and Scott Patterson (*Gilmore Girls*), it's backed by the producing power of Evan Katz (*24*) and Jeffrey Reiner (*Friday Night Lights*). Up against prime-time soap *Lonestar* on Global, *The Event* will likely fill the void indeed.

Chase (NBC) Mondays 10-11 p.m.

Adrenaline junkies are sure to get a kick out of Jerry Bruckheimer's action drama about a team of U.S. Marshals hunting down fugitives. Starring Kelli Giddish (*Past Life*), who manages to stay beautiful as she leaps off buildings, the series has everything you'd expect from an hour of Bruckheimer, but could face a tough battle against the much-anticipated *Hawaii Five-O* on Global.





Jerry Bruckheimer's *The Whole Truth* on Citytv offers legal drama with perspective, following both the defence and the prosecution. It's up against *Law & Order: Los Angeles* on CTV in the same slot.

Undercovers (NBC) **Wednesdays 8-9 p.m.**

Bringing a little sexiness to the fall schedule is J.J. Abrams with this new spy drama. It stars Boris Kodjoe (*Surrogates*) and Gugu Mbatha-Raw (*Doctor Who*) as a seemingly normal couple (besides their extreme attractiveness) who happen to double as spies for the CIA. They take their *Mr. and Mrs. Smith* act all over the world, or at least to the most visually interesting locales. It may benefit from audiences with *Survivor* fatigue, and stands a good chance against the less exotically premised newcomer *The Defenders*.

The Whole Truth (ABC) **Wednesdays 10-11 p.m.**

City has another Jerry Bruckheimer drama up its sleeve with this legal offering that shows both sides of a hot case, the defence and the prosecution, equally. It stars Rob Morrow (*Numb3rs*) as one of the legal eagles. (Joely Richardson was also slated to star, but backed out of the show. At press time, Maura Tierney was said to be in talks to replace her.) *The Whole Truth* will go head-to-head with another legal series, *Law & Order: Los Angeles*, and psych drama *Lie to Me*. It will be a tough battle to win the case for viewers in this timeslot.

CTV BY MELITA KUBURAS

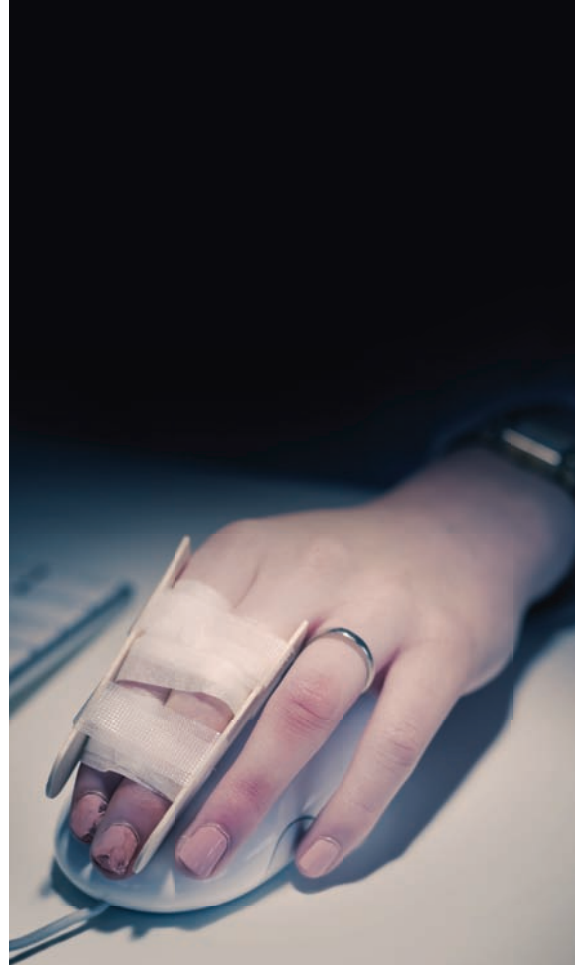
No Ordinary Family (ABC) **Tuesdays 8 p.m.**

An earnest dad (Michael Chiklis, *The Shield*), busy mom and bratty teenagers are just a regular family trying to squeeze in some bonding time during a vacation when their flight crashes into the Amazon River and they acquire superpowers. Sure, they can suddenly leap over buildings, read minds and acquire a "lair with Wi-Fi," but underneath it all this story is limited to mundane, middle-class family problems. It may take a crew of X-Men to beat out the high school *Glee* team (its competitor in this timeslot), but these heroes lack the sardonic dark side that makes superheroes so intriguing.

The Defenders (CBS) **Wednesdays 8 p.m.**

Jim Belushi describes the two prosecutors played by himself and Jerry O'Connell as two "working class guys who passed the bar" and therefore have the street smarts that perhaps other lawyers lack.

When they're not in the courtroom, the defenders are trying to sort out their colourful personal lives. Belushi's character is spying on his wife whom he suspects of cheating, while O'Connell's has an assortment of Las Vegas babes and fast cars that occupy his time. *The Defenders* is funny enough to be the long-term



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Jim Belushi and Jerry O'Connell play "working class guys who passed the bar" in CTV's *The Defenders*, which may have a tough battle against *Undercovers*.

nest both seasoned actors have been looking for, but it's up against J.J. Abrams' new spy entry *Undercovers*, so has tough competition. *The Defenders* is also not airing in simulcast, so if it attracts a first-time audience it may be on another network.

Law & Order: Los Angeles (NBC) Wednesdays 10 p.m.

Last fall, the Los Angeles Police Department (LAPD) arrested four teen girls for allegedly breaking into the celebrity homes of Paris Hilton and Lindsay Lohan and stealing their party dresses. The crime showed just how far someone who is fascinated by Hollywood will go to attain that lifestyle, and as the news spread, celebrity gawkers wondered what other perverse cases the LAPD sees on a daily basis.

The networks have not released casting details of *Law and Order: Los Angeles* as of press time, but we can expect the familiar structure with storylines that are loosely based on celebrity crime news stories to the score of Lady Gaga (one can hope).

Law and Order: Los Angeles is up against another courtroom drama, *The Whole Truth*, which presents a case from the perspective of both

the DA and the defence, and which Dick Wolf should have no problem winning against.

\$#! My Dad Says (CBS) Thursdays 8:30 p.m.

William Shatner takes on another not-all-there role as a dad who compares women to lawns "begging to be mowed" and calls his heavyset son (Will Sasso) "James Gandolfatty."

Spewing one-liners with a complete disregard for consequences, it's almost as if he were tweeting them to an anonymous account. Now if only someone would create a show based on a Twitter hash tag...oh, wait. This half-hour sitcom based on an internet meme about an aging father whose younger son moves in with him because he can't afford to pay his rent anymore, will go to battle with Citytv's *30 Rock*. Shatner has a hefty fan base of all ages, so he has a good shot against Tina Fey and co., whose audience skews female and younger.

Blue Bloods (CBS) Fridays 10 p.m.

The future of this cop drama from the exec producers of *The Sopranos*, about a New York family that has three generations employed in the law-and-order industry, will wholly depend on how addictive the plot is as it matures. Tom Selleck, who plays the chief and patriarch of the family, should attract a slew of female fans but the amount of screen time he gets will depend on how much trouble his oldest son (Donnie Wahlberg) gets into, and if his by-the-book district attorney daughter (Bridget Moynahan) can bail him out quickly.

The Friday timeslot is not ideal but *Blue Bloods* will likely attract a wider demo than its competitors *Mantracker* and *Outlaw*, and if CTV streams the series online, it could gain enough momentum to coast into another season.

The Conan O'Brien Show (TBS) Mondays to Thursdays 1 a.m.

TBS, Conan O'Brien's new network in the U.S., is proving to be a lot more appreciative of the comedian than NBC was. Earlier this month TBS launched an ad campaign to encourage Emmy voters to honour O'Brien's work on NBC's *The Tonight Show*, with zingers like: "Outstanding achievement in the use of SPF150."

CTV will air Conan after Jon Stewart and Stephen Colbert, but the net also hinted that viewers with full-time jobs will be able to watch O'Brien earlier on the Comedy Network. O'Brien has millions of fans in Canada, but whether he can overcome the curse of the timeslots is one of the most debated of this season's fall TV predictions.



From the executive producers of *The Sopranos* comes *Blue Bloods*, a character-driven cop drama starring Donnie Wahlberg. It airs Fridays on CTV.



Oscar-winner Forest Whitaker heads to the small screen in a *Criminal Minds* spinoff, scheduled to launch midseason on CTV.

MIDSEASON

Mr. Sunshine (ABC)

We know one show this season is based on a Twitter account, but is *Mr. Sunshine* inspired by the blog Stuff White People Like? There are a disproportionate number of racist jokes in the pilot of this comedy about a middle-aged sports arena manager (Matthew Perry) and his boss (Allison Janney). But while some of the lines presuppose irony – “Get me an Asian kid!” screams Janney before a press conference, and in another scene, “Yay, black kids!” – others do not, like the fact that Perry’s character can’t remember which of his Latino co-workers is Miguel, so he calls them all Miguel.

The Borgias (Showtime)

The Borgias, which is about the infamous and powerful family living in Rome during the Renaissance, will appeal to the period piece and intrigue buffs who pick up on all the Machiavelli references and pretend to be annoyed by sensational scenes of inaccuracy.

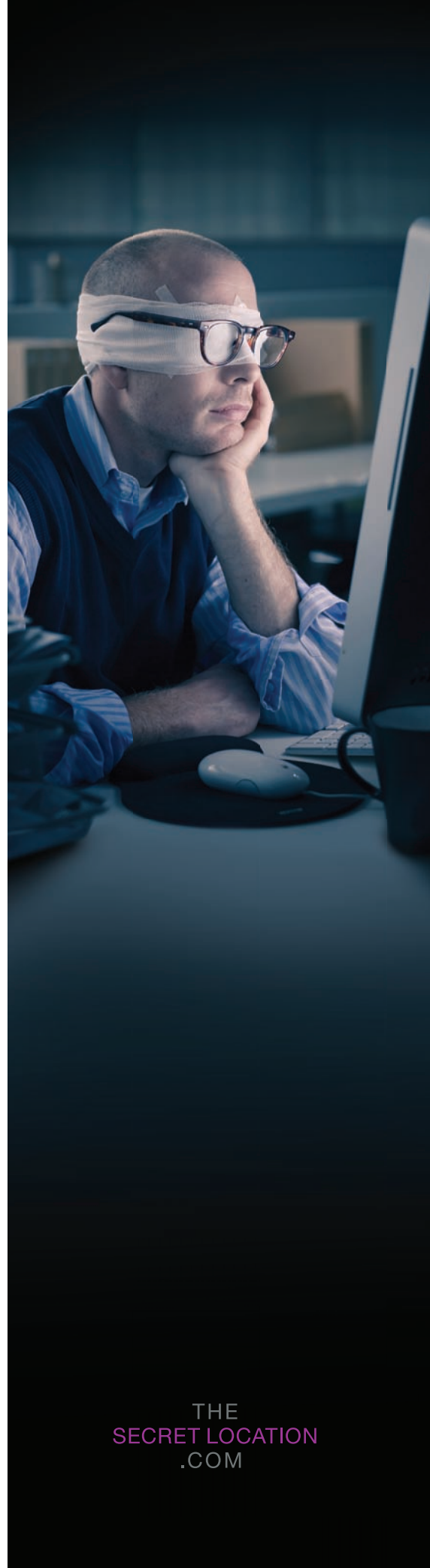
The family’s patriarch (Jeremy Irons, *Being Julia*) becomes Pope, however his family gets caught up in all the betrayal and scandal that comes with power.

Got to Dance (CBS)

Paula Abdul will get more air time than ever as the exec producer, coach, lead and creative partner on this reality series based on Britain’s popular show of the same name. Abdul’s Twitter fans reportedly can’t wait to be confused by the 47-year-old’s woozy talk, and given the high ratings of dance-related programs, it seems boogie is in and vocal prowess is out.

Criminal Minds Spinoff (CBS)

Forest Whitaker (*The Last King of Scotland*) leads a team of FBI agents whom he handpicked to help the unit capture violent criminals. Now going into its sixth season, *Criminal Minds*, which attracts about 2 million viewers according to BBM Canada, was due for a refresh and has enough support to expand the brand. When the show debuts,



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Audiences will have to wait a little longer for Simon Cowell's *X Factor*. The former *Idol* judge fans love to hate will debut his new show in Fall 2011 on CTV.

Whitaker could also attract the film crowd who wants to see how the Oscar winner fares on the small screen.

The X Factor (FOX) **Fall 2011**

North American viewers won't see too much of Simon Cowell this season, but in 2011 the *American Idol* judge that audiences love to hate will bring his brand of blunt honesty to wannabe musicians and singers in the U.S. "Proven ratings, proven success," is a network mantra, and with 500 million fans across 18 countries, it can safely be applied (a year early) to Cowell's newest talent show brand.

A

BY MELITA KUBURAS

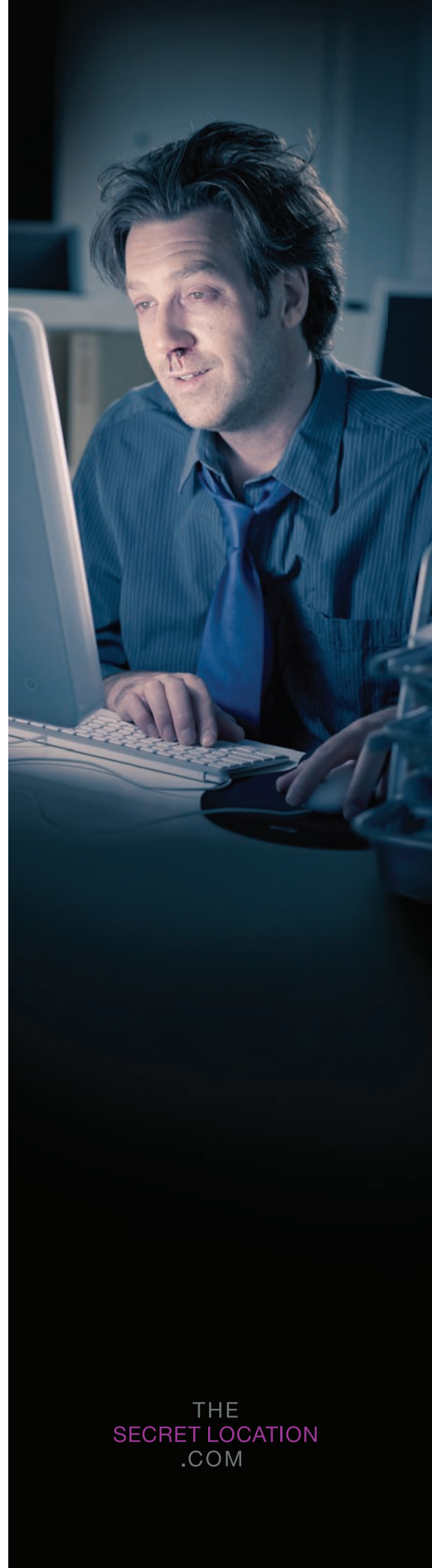
Mike & Molly (CBS) **Mondays 9:30 p.m.**

This sitcom about an overweight couple might make a genuine connection with viewers, many of whom perhaps battle food addictions of their own. But how many times can Billy Gardell's (*My Name is Earl*) character knock over a table with his oversized belly before viewers tire of the fat jokes? Gardell and Melissa McCarthy (*Gilmore Girls*) have genuine comedic chops, but the secondary characters, such as Mike's mouthy partner (he's a cop) and Molly's dope-smoking, slutty sister can be irritating, despite their show-

stealing quality. The *Two and a Half Men* lead-in might help *Mike & Molly*'s odds if viewers don't wander to catch the second half of *Dancing with the Stars*, which is on at the same time. However, new temptations in this timeslot include much-buzzed about *Lonestar* and *The Event*, and the competition may eat into its debut.

Hellcats (CW) **Wednesdays 9 p.m.**

Gossip Girl's success proves there's an audience happy to follow the lives of beautiful women who are also unpretentiously relatable. The peppy *Hellcats* must find this difficult balance or risk a meltdown faster than Ashton Kutcher's *A Beautiful Life* had last season. *Hellcats* follows a pre-law student (Aly Michalka, *Bandstand*) who is as anti-pomp as an indie rocker can be (except for her blonde hair, perfect figure and gymnastics background) until she finds out that in order to obtain a scholarship, she must join the squad. Mean girls hate her sexy brand of cheerleading – "I think she forgot the pole," says one frenemy – which would be amusing if it weren't for boring scenes of hurdles, grinding and the tuck/eagle spreads that continue well into the regionals. Slot competish *Modern Family* attracts a slightly older crowd, which is why *Hellcats* has a good shot, provided it can bring it with the storyline.





Jimmy Smits returns to television in legal drama *Outlaw*, airing Friday nights on Global. It's up against CTV cop show *Blue Bloods* in the 10 p.m. timeslot.

Nikita (CW)

Thursdays 9 p.m.

There hasn't been a truly badass chick on TV since the departure of Jennifer Garner and *Alias* in 2006. *Nikita* (Maggie Q, *Live Free or Die Hard*), who explodes cars with a twist of her lipstick and breaks necks with a flick of her powerful wrist, is hot enough to fill that role. *Nikita*, however, is an unoriginal story of a trained assassin who leaves the Division only to wage war on the corrupt organization. Exec producer McG (*The O.C.*, *Charlie's Angels*) knows the female-skewing target well and will put just the right amount of explosions and undercover ball gown ops in this *La Femme Nikita* remake, however J.J. Abrams (*Alias*) knows the genre even better, and his drama *Fringe* airing on Citytv will likely prevail.

GLOBAL

BY JONATHAN PAUL

Hawaii Five-O (CBS)

Mondays 10-11 p.m.

This high-octane contemporary remake, developed by J.J. Abrams's disciples Alex Kurtzman and Roberto Orci, has witty banter, gunfights aplenty, that familiar theme song and, yes, even that famous catchphrase. Following a new elite federalized taskforce as they rid Hawaii of uber-dangerous criminals, it boasts a seasoned cast of TV actors including Alex O'Loughlin (*The Shield*) as

detective Steve McGarrett, Daniel Dae Kim (*Lost*), Vancouver-raised Grace Park (*Battlestar Galactica*) and film actor Scott Caan (*Ocean's 11, 12, 13*). This cop action/drama is certainly poised to attract new and old fans alike and pull the rug out from *Castle*'s feet, though stiff competition from Jerry Bruckheimer's similarly plotted *Chase* should make things interesting.

Outsourced (NBC)

Thursdays 9:30-10 p.m.

The manager of Mid-America Novelties moves unexpectedly to India when his company's call centre is suddenly...wait for it...outsourced in this unfunny comedy, from writer Robert Borden (*The Drew Carey Show*).

The laughs are meant to be generated by the ensuing culture clash as he acclimatizes to his new digs and team, but it's only *Drew Carey* alum Diedrich Bader's minor role that gets the real chuckles here. Aiming to hit the mark with 20- and 30-somethings, with timeslot competitors *Grey's Anatomy* and *Fringe* vying for eyeballs, this show might find itself in a situation that's no laughing matter.

Love Bites (NBC)

Thursdays 10-11 p.m.

The brainchild of Emmy-winning writer-producer Cindy Chupack (*Sex and the City*), this comedy takes a fresh perspective on

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New made-in-Canada cop show *Shattered*, on Global, stars Callum Keith Rennie as a homicide detective who's battling multiple personality disorder.

modern romance, examining all the quirky things that can result. It features three loosely connected tales per episode, which are anchored by the story of two friends, Annie and Frannie, who experience hard luck when it comes to love. Though likely to appeal mostly to the ladies, look for this show to provide a light-hearted reprieve to couples seeking something to watch together in lieu of more serious shows like *The Mentalist* and *Law and Order: U.K.*

Outlaw (NBC) Fridays 10-11 p.m.

Jimmy Smits (*NYPD Blue*) makes his return to television in this legal drama, playing a U.S. Supreme Court justice who quits in order to return to private practice to fight for the little guy. Reminiscent of another ill-fated lawyer show, *Shark* (which lasted two seasons), this vehicle for the Emmy-winning actor might find itself in a fight of its own, up against new CTV cop show *Blue Bloods*, which gives lead Tom Selleck a stronger supporting cast and more subplots.

Lonestar (Fox) Mondays 9-10 p.m.

Complexity is the name of the game in this dark drama from the creators of *Party of Five* and director Mark Webb (*[500] Days of Summer*). It follows the trials and tribulations of a con-artist (newcomer James Wolk) who lives two separate lives with two different women whilst looking to make some semblance of a normal one. Boasting the likes of Oscar-winner Jon Voigt in its cast, and with big Texas oil setting the scene, look for this one to become a viable alternative given the departure of *24*, though *The Event* is sure to give these oil tycoons a run for their money.

Shattered Fridays 9-10 p.m.

An interesting premise promises to get viewers curious about this made-in-Canada cop drama starring acclaimed Canadian actor Callum Keith Rennie (*Californication*, *24*). He plays a homicide detective who, while battling bad guys, also battles his multiple personality disorder. With a timeslot that pits it against *CSI: NY* it might be in for a bit of a battle, but with some good Canadian acting, including Gemini-winning actor Camille Sullivan (*Da Vinci's Inquest*) as Rennie's partner, and factoring in potential forensic fatigue from *CSI*/overkill, people could develop a taste for this unconventional original offering.

Raising Hope (Fox) TBC

The unprepared dad raising a child solo has been done before (think *Three Men and a Baby*), but, it's being given a fresh spin here with the child's absentee mother stuck in jail giving custody to a seemingly inept father, a pool boy who lives at home with his decidedly blue collar family. With a good mix of funny moments that'll make young parents laugh and cringe, and touching ones that'll make them say, "aww," this comedy from Greg Garcia (*My Name is Earl*) could become a sleeper success.

MIDSEASON

Ride-Along (Fox) Mondays 9-10 p.m.

Starting mid-season, this cop drama set in Chicago follows boys and girls in blue led by a newly minted Chicago Police Chief (Jennifer Beals, *The L Word*), who is trying to clean up her city while combating powerful enemies amid city politics. Spawned from the mind of Shawn Ryan (*The Shield*), viewers can expect a lot of grit coupled with good, authentic storytelling informed by the very city in which the show takes place.



Court Armstrong joins PNH Innovations

– As Vice President of Business Development, Court's role is to enhance and grow the company's sales and marketing footprint and to lead a strong and dynamic sales force in the Toronto area. With printing and finishing facilities in Toronto and Montreal and sales offices in Vancouver and New York, PNH uses cutting-edge Large Format printing technology including Latex, solvent and UV roll-to-roll, solvent and oil-based dye sublimation, Lambda photo imaging and rigid UV printing processes to print on a vast range of media including paper, vinyl, pressure sensitive vinyl's, mesh, polyester fabric, biodegradable materials and rigid surfaces. PNH Toronto recently moved into a 15,000 sq.ft facility in Mississauga where in addition to this, it operates a separate 7,000 sq.ft vehicle graphic installation centre. Court has been serving a vast client base in the signage and digital printing industry for over 22 years.



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the national* fall tv schedule 2010/11

MON.	7:00	7:30	8:00	8:30	9:00	9:30	10:00	10:30	11:00	11:30
A	Corner Gas	Access Hollywood	Law & Order: SVU		Two and a Half Men	Mike & Molly	Criminal Minds		A News	Local listings
CBC	Wheel of Fortune	Jeopardy	Battle of the Blades	Men with Brooms	Just for Laughs		The National/CBC News Late Night		The Hour	
Citytv	Law & Order: SVU		How I Met Your Mother	Rules of Engagement	The Event		Chase		CityNews Tonight	EP Daily
CTV	eTalk	The Big Bang Theory	Dancing with the Stars				Castle		CTV National News	CTV News
Global	Entertainment Tonight	ET Canada	House		Lonestar		Hawaii Five-0		Global News Hour Final	

TUES.	7:00	7:30	8:00	8:30	9:00	9:30	10:00	10:30	11:00	11:30
A	Corner Gas	Access Hollywood	The Big Picture				Criminal Minds		A News	Local listings
CBC	Wheel of Fortune	Jeopardy	Rick Mercer Report	This Hour Has 22 Minutes	Being Erica		The National/CBC News Late Night		The Hour	
Citytv	Law & Order: SVU		The Biggest Loser				Parenthood		CityNews Tonight	EP Daily
CTV	eTalk	The Big Bang Theory	No Ordinary Family		Dancing with the Stars		Law & Order: SVU		CTV National News	CTV News
Global	Entertainment Tonight	ET Canada	Glee		NCIS: Los Angeles		The Good Wife		Global News Hour Final	

WED.	7:00	7:30	8:00	8:30	9:00	9:30	10:00	10:30	11:00	11:30
A	Corner Gas	Access Hollywood	America's Next Top Model		Hellcats		Criminal Minds		A News	Local listings
CBC	Wheel of Fortune	Jeopardy	Dragon's Den		The Tudors		The National/CBC News Late Night		The Hour	
Citytv	Law & Order: SVU		Undercovers		Modern Family	Cougar Town	The Whole Truth		CityNews Tonight	EP Daily
CTV	eTalk	The Big Bang Theory	So You Think You Can Dance Canada/	The Defenders	Criminal Minds		Law & Order: Los Angeles		CTV National News	CTV News
Global	Entertainment Tonight	ET Canada	Survivor: Nicaragua		NCIS		Lie to Me		Global News Hour Final	

THURS.	7:00	7:30	8:00	8:30	9:00	9:30	10:00	10:30	11:00	11:30
A	Corner Gas	Access Hollywood	The Vampire Diaries		Nikita		Private Practice		A News	Local listings

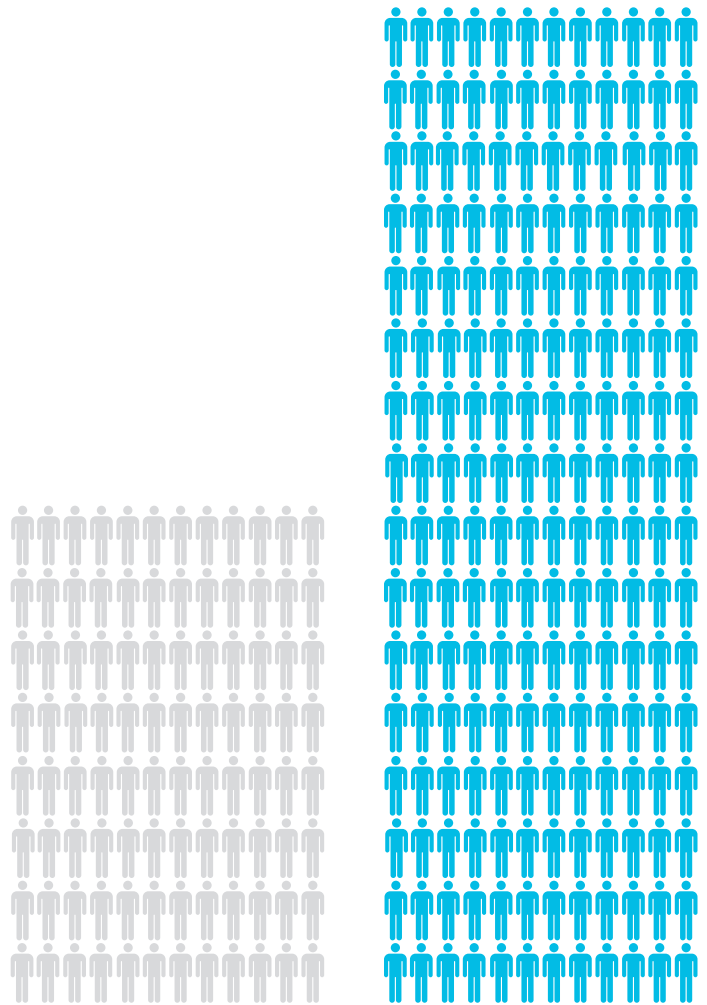
CBC	Wheel of Fortune	Jeopardy	The Nature of Things		Doc Zone	The National/CBC News Late Night	The Hour	
Citytv	Law & Order: SVU		Community	30 Rock	Fringe	Law & Order: UK	CityNews Tonight	EP Daily
CTV	CSI		The Big Bang Theory	SYNCD/\$#*! My Dad Says	Grey's Anatomy	The Mentalist	CTV National News	CTV News
Global	Entertainment Tonight	ET Canada	Bones		The Office	Love Bites	Global News Hour Final	

FRI.	7:00	7:30	8:00	8:30	9:00	9:30	10:00	10:30	11:00	11:30
A	Corner Gas	Access Hollywood	Medium		Dateline		Criminal Minds		A News	Local listings
CBC	Wheel of Fortune	Jeopardy	The Ron James Show	Rick Mercer Report (encore)	The Fifth Estate		The National/CBC News Late Night		The Hour	
Citytv	Law & Order: SVU		Hell's Kitchen		Survivorman		Mantracker		CityNews Tonight	EP Daily
CTV	eTalk	The Big Bang Theory	Human Target		CSI: New York		Blue Bloods		CTV National News	CTV News
Global	Entertainment Tonight	ET Canada	90210		Shattered		Outlaw		Global News Hour Final	

SAT.	7:00	7:30	8:00	8:30	9:00	9:30	10:00	10:30	11:00	11:30
A	Road to Avonlea		The Big Picture				Comedy Now!	Comedy Inc.	Local listings	
CBC	Hockey Night in Canada Game 1		Hockey Night in Canada Game 2							
Citytv	What's Cooking	The Most Amazing	Glen Martin DDS	Out There with Melissa DiMarco	Canadian movie				Crusoe	
CTV	W-Five		CrimeTime		CrimeTime		CrimeTime		CTV National News	CTV News
Global	Saturday Night Movies		Global News Hour Final							

SUN.	7:00	7:30	8:00	8:30	9:00	9:30	10:00	10:30	11:00	11:30
A	TMZ Weekend		The Big Picture				Criminal Minds		Local listings	
CBC	Heartland		Battle of the Blades		Debbie Travis		The National		The Fifth Estate (encore)	
Citytv	NFL	Mantracker	Extreme Makeover Home Edition		Conviction Kitchen		Murdoch Mysteries		Crusoe	
CTV	Undercover Boss		The Amazing Race		Desperate Housewives		CSI Miami		CTV National News	CTV News
Global	Ice Pilots		The Simpsons	The Cleveland Show	Family Guy	American Dad	Brothers and Sisters		Global News Hour Final	

*Note: This grid covers the national networks' schedules based on Toronto schedules (ET). Regional times for networks such as Citytv will vary. All information is tentative and subject to change. Bold indicates new programs.



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SHELF HELP A GUIDE TO SHOPPER MARKETING

In the world of marketing, the big idea is an endangered species. No matter how bold and beautiful the print ad or eventful and star-studded the television spot, its several smaller ideas, well-executed and tailored to specific retailers that are becoming the norm for marketers hoping to move products off store shelves.

Two years ago packaged goods giant Procter & Gamble initiated a “store back” program that requires its advertising and marketing partners to put “the moment of truth” at the forefront of all campaign ideas. In other words, if an idea doesn’t sell a product in the store, it’s not going to work at all.

This emphasis on success at the shelf level is driving a cultural revolution in marketers’ thinking. Though definitions vary, shopper marketing is a broad practice of tactics based on in-store data and insights aimed at influencing a shopper’s behaviour, both in the store and prior to their visit.

“It’s probably the biggest paradigm shift that’s happened to the marketing and packaged goods world since the advent of category management,” says Jason Dubroy, vice-president of consumer and shopper strategy at Toronto-based Spider Marketing. “You’ve got somebody at shelf level. They can pick up product A or product B. What are you going to do while they’re there at that retail moment to get them to connect with your brand and hopefully put it in their bag?”

The most obvious way to track the rise of shopper marketing is to follow the money. According to a Deloitte study from

the Grocery Manufacturers Association, consumer packaged goods (CPG) investment in in-store shopper centric campaigns has doubled since 2004 and has had an annual growth rate of 21%. The trend is expected to continue over the next two years at the expense of traditional marketing channels, such as print, billboards and television.

Two factors driving shopper marketing are the fragmentation of the media landscape and the consolidation of major retail outlets into a select, powerful few. In this new landscape, real-time technology that can measure data and sway in-store decisions has come to the fore, the dynamic between retailers and manufacturers has become more nuanced and collaborative, and there’s a greater impetus on executing campaigns in a timely manner.

“Marketers need to understand more about sales – it is not about drafting consumer campaigns in isolation,” says Liesbeth Teerink, VP managing partner of promotional and shopper marketing agency LAUNCH! “They need to have great collaboration skills to work with retailers and their partners in the sales department. They need to be innovative



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and not afraid to experiment. And most of all, they need to walk the talk. It's time for marketers to spend more time at those touch-points close to the point of purchase."

"Collaboration is king"

The speed with which data is gathered has allowed retailers to glean more accurate information about the right shoppers in a timely manner. They can then partner with manufacturers to make shopper centric decisions about all areas that impact the moment of truth: price, promotion, assortment, or in-store merchandising.

The rise of shopper marketing has caused a slight shift in the balance of knowledge in favor of retailers, meaning marketers

must collaborate more closely to capitalize on that knowledge.

"Collaboration is king," says Adam Murphy, VP, global retail & shopper practice at The Nielsen Company. "The challenge in realizing this is reconciling the 'whole of store' perspective and objectives of retailers, with more focused objectives of manufacturers. Delivering a 'win-win' is impeded when we don't acknowledge that we have different objectives. We work with our partners to develop collaborative frameworks. Successful collaboration balances retailer breadth of knowledge on shopper trips and baskets with manufacturer depth of knowledge in a category."

Retailers are more and more willing to share customer information with their key manufacturers, says Aidan Tracey,

LAUNCH!

LAUNCH! is a division of CIM, a 15-year old, privately held, leading-edge Canadian shopper marketing agency. LAUNCH! has main offices in both Toronto and Montreal as well as a number of regional execution centers across the country. Their promotional and experiential shopper marketing solutions help connect brands,

shoppers and retailers on various touch-points on the path to purchase. Last year the agency's brand ambassadors alone interacted with more than 13 million customers nation-wide.

The agency won numerous awards for their sales-driving and innovative campaigns, and recently partnered with *strategy* Magazine to bring success to the inaugural Shopper Marketing Forum, taking place in Toronto, Canada.

The agency gleans insights and intel directly from the store level, shopper and retailer panels and existing data and rewards programs to create campaigns for clients such as Apple, Beam, Carlsberg, 20th



Century Fox, Frito Lay, Colgate Palmolive, Metro, Nestle Purina, Olympus, Parmalat, Pepsico, Research in Motion (RIM), SC Johnson, Sirius, Whirlpool and Warner Bros.

"Obviously, when customizing campaigns, solutions do need to remain affordable for our clients," says LAUNCH! VP managing partner Liesbeth Teerink. "Sometimes this means we only create a campaign for one retailer, the one where we believe we can make the most impact. Other times it means we take an umbrella concept and create variations of those for various retailers."

"For marketers, it's not just about buying media anymore to get your message out there," says VP managing partner Robyn Gorman. "It's about developing and executing campaigns that are fundamentally driven from insights about the shopper, insights that lead to solutions that connect the brand, the shopper and the retailer."

Above: LAUNCH! Last 3 Feet™ approach delivers campaigns which connect brands, shoppers and retailers. Right: LAUNCH! VP managing partners Liesbeth Teerink and Robyn Gorman





CEO of experiential marketing, sales and merchandising agency Mosaic and formerly a brand manager at Procter & Gamble.

"Retailers are becoming much more collaborative. Information has been becoming more of a two-way street. If it's only one sided, it's not going to work," he says. "The role of the retail environment has come right to the forefront and is at the head of the class. The most exciting thing for us as a service provider in this space is, as we approach 2011, there is a massive revolution and there's no question that marketers are readjusting their budgets."

The impact of data and analytics

When it comes to shopper marketing, global information and measurement company Nielsen encourages their clients to differentiate between "consumers" and "shoppers".

Consumers exist outside the store and chatter online or among friends about cooking habits, style and household trends. Shoppers, on the other hand, take that information and choose to make a purchase. They have store preferences, brand loyalties, shopping lists, and discerning opinions when it comes to prices and promotions.

"Recognizing these differences is the first step in providing relevant and engaging shopping experiences," says Laura Warren, Nielsen's VP global retail & shopper practice. "Now that we make the distinction, having the ability to affect shopper behaviour becomes even more meaningful."

A popular way to capture shopper information is through retailer loyalty cards. Nielsen's research shows that Canadians love loyalty cards; almost every household participates in at least one program and more than half hold a minimum of four cards in their wallets.

"This represents an incredible opportunity to uncover new perspectives on the types of shoppers shopping the store; what is important to them, how to reach them and ultimately how to prioritize shopper marketing initiatives," says Warren.

Identifying the right shoppers to target is also a driving factor for success, says Brian Ross, general manager of consulting and analytics firm Precima. For classic retailers, 20% of the customers typically drive 60% of the value. Not only is growing that market segment easier than attracting new customers, it is paramount within the new world of shopper marketing to win over competition.

"Interestingly, we find in almost every case that those consumers who contribute the most value still have the greatest potential value," he says. "We'll go in and identify those consumers, what items matter most to them and which items are they most price sensitive on."

The classic pricing strategy is to select a handful of items using volume and market data to price match against key competitors. However, Ross says this approach can be significantly improved through use of deeper shopper insights.

How price is determined, says Ross, will be one of the most critical factors for shopper marketers over the coming years, thanks in part to the recent recession. Knowing that the trend of consumers placing a higher value on price will continue well into

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Pareto helps clients sell more with a full suite of Shopper Marketing services

Pareto

Pareto helps their clients sell more by implementing shopper marketing strategies inside and outside of the retail environment.

With a breadth of services to offer, Pareto helps turn shoppers into buyers by putting the emphasis on execution and stimulating purchase activity.

Today's shopper is busy and has more product choice than ever before. When shoppers are in the sale, they're influenced by price, gifts with purchase, and even sales staff. Pareto shopper marketing is about owning the environment and driving a purchase decision.

"The right messaging—in the right place, at the right time—can trigger impulse," says Executive Vice President Michael Lang.

Pareto's concept of the shopper and the store applies to clients in almost any industry. "The store can be a retail environment, a bank, or any place our clients interact with consumers."

The final purchase decision puts consumers in the moment. This is when the shopper becomes a buyer. Lang says Pareto is the national leader in managing the end-to-end production of mass customized in-store point-of-sale collateral.

Pareto has structured their business as a one-stop-shop for clients to get in the game and execute shopper marketing strategies that result in measurable sales lift.

the future, using transaction-based data along with powerful measurement tools setting your company's agenda vs. responding to what your competitors are doing will enhance your marketing and merchandising efforts driving results and long-term growth.

The extra emphasis on execution

A good shopper marketer is not only sensitive to its core customer groups, but the type of customers its retailers want to attract. New technology and data gathering techniques have also given rise to more nuanced campaigns that are customized for specific stores.

Kraft Canada, for example, customizes more than 200 programs a year for its retailers. "Customization is founded upon insight about our customers' shoppers and our customers' strategic objectives," explains Melissa Martin, Kraft Canada's director customer & shopper marketing. "The goal is to synergize the best of both in conjunction with our objectives so that everybody wins."

Similarly, last year, LAUNCH! managed the shopper marketing for the Dairy Farmers of Canada's Cooking with Cheese campaign. The agency sent a fleet of brand ambassadors armed with handheld scanning devices into stores. On the spot, the ambassadors scanned shopping cart contents and printed out cheese-friendly recipes and dinner suggestions based on the ingredients.

"Shoppers loved the added value," said Teerink. "It sold cheese and even other products, essentially increasing basket size."

LAUNCH! develops these types of winning initiatives based on "A-ha moments" when "Last 3 Feet" insights drawn from data and research successfully translate into sales, benefiting brands, buyers and sellers alike.

Increasingly, those insights are coming from daily sales data. For marketers, that means adjusting to a new, real-time reality. "There is no such thing as three months of planning and then a year of executing," says Teerink. "It is a daily cycle of planning and execution with execution actually driving planning."

One company that's focused 100% on execution of complex in-store and experiential campaigns is Pareto, which implements and mass-customizes shopper marketing materials at its large production plant in Richmond Hill. With a national network of merchandisers and experience in all facets of in-store and online marketing, including direct sales and experiential.

"An ad agency, as an example, doesn't have enough people in enough roles consistently to deliver on the demands of execution over time," says Michael Lang, Executive Vice-President at Pareto. "Their core business should be ideas, insights and creative and then recommending the right channels. The afterthought is the details in the execution."

Timing is key, and Lang emphasizes the importance of keeping

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this top of mind. Now that retailers track and review purchase data daily, it's crucial that marketers ensure products and merchandising materials are in stores quickly.

Pareto works with its clients to reduce costs and cycle time in the consumer communications process. It benefits from a vast national network of retail merchandisers, conducts planogram management, audits, erects displays and runs and executes in-store promotions and seasonal programs.

"We ask how many 'touch-points' there are" he says. "And with every touch-point comes a delay in time and usually an inefficiency along the way in terms of cost."

"It's shocking how much money is spent on programs that actually don't physically get up in store at the right time at the right place," he continues. "There are statistics out there that say compliance varies from 30% to 75%."

Lang says there is a direct correlation between the in-store experience and sales lift. "If you're able to properly merchandise a shelf where the right ideas line up with the flyer and the flyer lines up with the loyalty offer, whether online or through the mail," he says, "then you're building a strong experience that shoppers will respond to."

One retailer that is forcing customization with its manufacturers is Loblaw. "We really won't take campaigns

that are delivered in a very generic way," says Craig Hutchison, SVP marketing. "We really want to have the manufacturers and their customer marketing departments work with us on how we make our eventing or our programs really meaningful for our customers."

Loblaw spent the past six months planning its big summer push: Canada's Biggest BBQ campaign. Beginning in May, the grocery chain started touring across the country to set up pop-up picnics at community events and store parking lots.

Loblaw partnered with ad agency Bensimon Byrne to create TV spots starring executive chairman and spokesman Galen G. Weston, PR company Hill & Knowlton and experiential agency Mosaic, which deployed and staffed the tour. Every department in the store is represented in the campaign, which also includes a major in-house online/social media component and contest for consumers to win a backyard makeover.

"For this particular program we really evaluated where we wanted to send the convoy based on our store, their sales, the consumers that are around that store," says Hutchison. "We expect to sample almost a million Canadians with the ice cream."

Chad Grenier, VP of Mosaic's packaged goods group, believes the integrated campaign will be lauded as one of the



- DIRECT MARKETING
- EXPERIENTIAL MARKETING



- MERCHANDISING
- SIGNAGE
- BRAND ACTIVATION



Mosaic Beauty Ambassadors provide personalized consultations and product recommendations

Mosaic

Veteran experiential marketing, sales and merchandising firm Mosaic zeroes in on the path to purchase which involves intercepting consumers where they work, live and play both live and digitally.

The agency builds brands by engaging consumers one-to-one and then driving them to the point of purchase where there's a flawlessly executed shopper marketing program in place. They've created campaigns for myriad blockbuster brands and retailers including Rogers, Olay, Stride, Xbox, Loblaw and Budweiser.

Mosaic has been designing strategies that live both in and out of the retail channel for years and puts emphasis on the value of campaign design and the importance of execution at retail.

For Anheuser-Busch's annual outdoor getaway contest "Bud Camp", Mosaic collaborated with partner agencies to build a buzz-worthy integrated campaign around young males' desire for an ultimate beer experience through in-bar events, web, print, radio, sampling and social media. As a result, 200 consumers attended Bud Camp, 17,000 on-premise one to one interactions and 35 million impressions across all media channels were generated. Originally an event idea, it has grown into a shopper-centric phenomenon that has won a number of awards. The initiative connected consistent branding from the event itself to word-of-mouth buzz to a killer TV spot to point-of-sale at the retail channel.



- EVENTS
- INCENTIVES
- INTERCEPT SALES



- PROMOTIONS
- CONSUMER LOYALTY

year's best because the client drove the strategy across all of its internal stakeholders and agencies. "Loblaw embraced an experience that cuts across all media," he says.

Another in-store marketing campaign that Mosaic created for Loblaw sprang from the insight that women shopping for beauty products rely on an expert sales consultant that can answer questions about the products.

"We worked with Loblaw to not only create a campaign in-store that would line up the flyer activity with the in-store merchandising," says Grenier. "But also place an in-store beauty consultant who would be there week to week to engage the consumer, have the dialogues about what their beauty needs might be and be there on a semi-regular basis."

The role of technology

Shopper marketing starts before a shopper even enters a store. "It's about not just understanding the role that technology plays in driving awareness," says Dubroy, "but also understanding the role that it has in manufacturing purchase intent."

"Understanding the differences between the two functions - and how much spend to apply to each - is critical for progressive marketers to drive maximum ROI. Spider helps

clients identify which solutions will drive the most behaviour change, and then implement the right tools and creative to help influence shopper choice rather than just become another distraction."

And there are many distractions. Retailers are installing interactive kiosks and LCD screens at shelf level that show commercials, pitch incentives and display product info, QR codes on packaging allow shoppers with web-enabled phones to access pricing info online, GPS software can source low-priced items in nearby stores and RFID-enabled displays text exclusive e-coupon offers to shoppers' mobile phones.

Despite all these new gadgets, shoppers have sophisticated social networks and infinite intelligence sources to help them make decisions. That means they are open to experimentation and prone to unpredictable behaviour.

"Many marketers are making the mistake that this is all about new media technologies at store. We see that differently," says Liesbeth Teerink, VP managing partner of marketing agency LAUNCH! "The most important part technology plays is in providing tools and processes to gather continuous information that can be translated into shopper insights."

For example, LAUNCH! analyzed path to purchase of appliance shoppers for Whirlpool and found that the majority



Spider Marketing Solutions uniquely combined shopper and retail insight to support Mattel's launch of their fashion-forward Barbie Fashionista dolls at numerous retailers across the country

Spider Marketing Solutions

As Canada's only boutique shopper marketing agency, Spider has established a niche for itself as a passionate leader of brand activation and shopper marketing solutions through the use of its proprietary shopper innovation process.

This process combines a series of information gathering tools, insight and ideation and helps clients navigate the unique needs and motivations between shoppers, retailers, and products

- whatever the trip type, channel format, or communication vehicle.

Through this systemization of the shopping process, Spider is directly addressing the call from marketers for consistent and measurable shopper focused ideas that drives bottom line value. With a growing group of Canadian retail experts and award winning creatives, Spider has built a reputation as an 'ideas company' working with Mattel, Energizer, Coca Cola, OLG, and Church & Dwight, among others.

"Big results begin with the shopper in mind so everything becomes a holistic approach," says Jason Dubroy, vice-president, consumer and shopper strategy. "This approach starts before people get into the store, and then follows by activating timely and relevant information to empower shopper choice."



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Using shopper purchase data, manufacturers can identify which items are most important to priority shoppers as well as their price sensitivity to those items

Precima

The wealth of transactional data available through frequent shopper programs, new shelf-level technologies and customer insights is giving retailers and manufacturers to understand a daily, even real-time understanding of the reasons behind purchase decisions.

For a big grocery chain with millions of consumers buying millions of items each week, making sense of all that data to gain competitive advantage poses a challenge. Enter consulting and analytics firm Precima.

As the analytics consulting firm within LoyaltyOne, the Alliance Data-affiliate has spent more than 16 years working with the retail partners of the Air Miles Reward Program – Canada's premier loyalty program to develop and execute customer plans.

Precima starts by identifying different types of shoppers, developing a consumer strategy around their needs and then using those insights to drive marketing, merchandising and operations strategies around those needs. They work with clients every step of the way to build an organizational plan to help them evolve to a more shopper-centric organization.

Precima's extensive experience makes them an ideal partner when planning to integrate "shopper-centricity". As president Brian Ross explains it, "it requires a fundamental shift in how you do business and go to market. Consumers don't think in categories, they think in terms of their needs."

of decisions are made in the store after in-depth discussions with sales associates. The agency also found that at peak times, there's often a shortage of associates on the sales floor.

"We created a self-serve interactive solution with information screens build into the Whirlpool appliances where consumers would have access to rich content at their finger tips," says Teerink. "They also could be used by sales associates as a sales tool."

Pareto's Michael Lang sees the future of shopper marketing becoming more complex as new technologies help retailers and manufacturers customize in-store offers in real-time.

"The challenge will be the fine line between being too intrusive and offering value," he says. "You don't want to grow so rapidly that people feel there's too much intrusion going on. But, like any new technology, it will find its place."

The future of shopper marketing

One oft-cited obstacle to shopper marketing is a set measurement system for results, but not everyone believes an industry-wide standard is necessary.

"We can't speak for the industry, but we do think each organization has its own objectives and business goals," says Ian Roberts, group director, integrated customer marketing, ConAgra Foods Canada. "So to standardize may limit innovation."

Kraft Canada's Martin points out there's no industry standard for traditional media. "The objective of shopper marketing is to influence behaviour," she says. "The behaviours and objective will be different by retailer and category shopper. The measurement of success will be determined by the results against the collaborative objective."

Retailers and manufacturers continue to get more and more competitive," says Precima's Ross. "A lot of the strategies that have been implemented to date have resulted in lost competitive advantage in that category management or traditional practices have often been [based on] 'same tools, same process, same data'."

For collaboration to work, marketers must be willing to make fundamental changes to their organization and retail relationships. Marketers must first align and elevate their individual brands to the needs of the shopper and then determine how to engage with key retail partners. Driving that change is a recognition that new forms of competition require new ways of working.

Return on investment in shopper marketing is not just about sales, but the long-term relationship between the shopper, the brand and retailer. These are all important metrics that relate to ROI, says Robyn Gorman, VP managing partner at LAUNCH!

"Opportunities to experiment with control stores, pre-testing messages and activities with shoppers will give us



insights into what works and what doesn't work," she says. "The real value in standardizing any form of measurement will come from this knowledge. At LAUNCH! we have various processes for measurement by category for a variety of our clients – ROI and success at retail is a key driver for our clients and for us."

Shopper insights will allow companies to focus on the right prices for the right types of consumers. For core consumers, for example, price is only one important factor among many, including retail experience and location. Identifying these types of consumers is also important for brands (and retailers) in determining the assortment of products they carry on store shelves.

One potential negative impact this insight is product de-listing. To save costs and improve the shopper experience, retailers are reducing the number of products they carry. According to a 2007 study by consultancy firm Bain & Company, cutting the number of products on shelves can increase sales by as much as 40% while cutting costs 10 to 35%. Wal-mart, for example, reportedly de-listed Glad and Hefty brand garbage bags earlier this year.

Precima's Brian Ross' advice to marketers worried about life on the "D" list? "Figure out which retailers are going down this path of using shopper insights to drive those decisions. Prioritize those retailers and start to think about how do you use insights on their shoppers to drive your brand strategy," he says. "If you focus on the shopper that should align both interests."

The future of shopper marketing is increasingly real-time, 24 hours and based on collaboration. The "end" moment of purchase is now the beginning

To that end, it's important that marketing departments are open to the reconfiguration and education that needs to take place to integrate shopper marketing properly. Companies that once viewed brands by category must now recognize that consumers do not think in categories, but consider a wide-range of brands.

Marketers must have a keen interest in emerging technologies and be excited by the challenges created by increasingly nuanced executions.

"The shopper and the retailer have both become more powerful in the past few years," says Dubroy. "The implications for this shift have begun to already impact the day-to-day operations of manufacturers from marketing right through to supply chain." The next step for the industry, he says, will be a unified framework of best practices regarding three core areas of shopper marketing: collaboration, standardization, and enablement.

"The most prestigious marketing awards will not be about Clios for TV ads," says Teerink. "They will be for breakthrough shopper marketing campaigns based on unseen-before collaboration. As a Canadian industry we can make this happen. Call me a dreamer, but I firmly believe in this and it gets me jumping out of bed every morning to get to work on exactly that." •

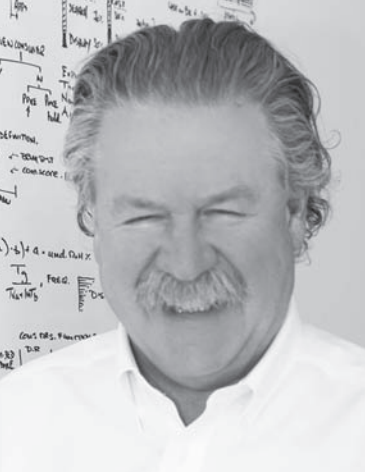
The Nielsen Company

Global information and measurement experts The Nielsen Company provides fast-moving consumer goods manufacturers and retailers around the world with fundamental, business-critical insights about what consumers watch, what they buy, how they shop and how they react to marketing exposures to help them capitalize on opportunities to identify, attract and retain their most profitable consumers.

Nielsen's philosophy is less about "tools" and more about building unique frameworks that help its clients understand the often unpredictable motivations behind shoppers' decision-making, as well as identify opportunities to retain priority shoppers and attract new ones.

Drawing on decades of experience offering customized metrics for retailers and manufacturers, Nielsen coaches clients to recognize how shoppers are impacted by different shopper marketing tactics depending on their reasons for going to the store.

Metrics are integral to the shopper management process and the only way to quantify the impact of strategies. "As we see more marketers embracing shopper marketing initiatives, we will see greater consistency in metrics as we are able to establish market norms and understand the parameters of behaviour," says Laura Warren, Nielsen's VP, global retail & shopper practice. "Nielsen plays a leading role in establishing market performance norms."



BY ROB YOUNG

LAST MASS STANDING

TIME & SPACE

It's easy (and fun) to poke holes in past predictions made by media futurists. Take George Gilder for example, who, in the mid-'90s, prophesized, "Computers will soon blow away the broadcast television industry. But computers pose no such threat to newspapers" (p. 139, *Life after Television*, 1994).

This was a reasonable enough prediction in its time. But media transitions the way water flows downstream – never in a straight line. As it turns out, online is throwing a nasty one-two punch to newspapers, combining free content redistribution with pilfered classified ad revenues. Television, on the other hand, is exhibiting signs of – well, more than just survival.

Apart from a few bumps and bruises, television is still standing tall. Here in Canada, Shaw's acquisition of Canwest demonstrates \$2 billion worth of faith. Record high audiences captured by the 2010 Winter Olympics broadcasts suggest that group-view is still popular. Resilient TV ad revenue levels during our country's nasty '08/'09 recession belied most marketer's predictions.

TV has developed a degree of immunity against this "online contagion." *The Economist* recently published a Special Report on Television (May 1, 2010) that agrees with this claim. Threats to TV from digital technology are reviewed in detail but overall, the report concludes: "In a world of fragmenting audiences [television] is the only real global mass medium. If TV can combine scale with specificity, become more responsive to its audience and learn to aim adverts more precisely, it will continue to thrive."

In other words, TV could well be the "last mass standing" in our media world.

It's hard to believe that television remains relatively unscathed having passed through the internet's technological gauntlet – mobile, PVRs, Hulu-ism, streaming, computer screens and fragmentation.

But the voices prophesying the negative transformation about to befall television all fall under only two doomsday narratives.

The "deconstruction" narrative: can television survive online's ability to provide niche programming?

And the "bypass" narrative: can television survive online's ability to digitally stream programming direct to the

consumer's computer/phone?

The "deconstruction" narrative asserts that online outperforms TV in providing coverage of specific areas of program interest. Want to find out about tajine cooking? You could waste a lot of time tracking this theme down on the Food Network but a quick online search gets you all you'll ever need to know.

Also known as "disaggregation," this doomsday narration argues that online has harmed the music business by turning LPs into tracks; has harmed the newspaper business by turning newspapers into articles; will harm the television business by hijacking audience, time and attention, and turn TV networks into a search list of programming niches.

But a reality check shows that total time spent with television is holding and the anticipated audience exodus isn't happening.

This is because online simply does not have a business model capable of matching television's ability to produce high-quality programs such as *Six Feet Under*, *Battlestar Galactica*, *Mad Men*, *The Wire*, *Dexter* or even mass audience appealing *CSI*, *Heroes*, *Lost* and *Idol*.

The "bypass" doomsday narrative is also called "disintermediation" and refers to online's ability to bypass the TV medium and directly reach the consumer by providing on-demand entertainment. Television can't compete with an online streaming service that provides TV shows for free (or cheaper) with no

commercials (or fewer) on-demand, or so the line of logic goes.

The important reality check here is that the television business owns the programs. TV programs are streamed at the bequest of the television medium, not the online medium. And the individual act of viewing streamed programming is at odds with group-view, which accounts for a great deal of TV viewing (especially sports viewing).



Television is surviving because control over quality programming trumps the worst-case scenarios forwarded by these two technological doomsday narratives.

At current rates of growth, internet ad revenue will surpass television revenue levels by 2014. This fact is often heralded as evidence of television's demise. However, we must remember that a portion of that online ad revenue is generated by TV-owned online businesses.

Furthermore, almost 40% of that online revenue is generated by "search" tools (advertisers pay to have their ads or links appear close to online search results). This revenue stream has more in common with directories and classifieds than the branding commercials carried on television.

The television business model calls for huge content investment, which, for the internet, represents a big barrier to entry. Consumers seem prepared to trade their time and attention in exchange for quality AV entertainment, and as long as they continue to do so, TV will be the last mass standing.

Rob Young is senior VP director of insights and analytics at PHD Canada.





BY TONY CHAPMAN

REMEMBERING A MARKETING MAVERICK

ROGER BARANOWSKI

On June 4, 2010, hundreds of people, many titans of the advertising and marketing industry, came out to say their goodbyes to Roger Baranowski, a wonderful leader and mentor who not only believed that anything was possible, he did everything in his power to make it probable.

Roger was a wonderful character in an industry sadly devoid of characters. He was like someone you would fall in love with in a John Irving novel – not the one searching for a spotlight, but the understated one who, as the plot unfolds, you find holding the cards and having a hell of a time playing them.

Roger fought ALS, an un-fightable disease, with courage, humour and conviction. His legacy continues with the love of his life, his wife Kathy, their two remarkable sons, Zach and Josh, and everyone who had the honour of working with him.

I was one of them – I have been walking the halls of Pepsi for 28 years and I started working with Roger in 1983. I saw him fast track to VP of marketing, and then move on to become the president of Hallmark Canada for eight years. Most recently, he was a teacher at Toronto's Centennial College and an intelligence gatherer for Capital C.

I have always measured an individual by their head (how they think), their heart (how they feel) and their hands (how they act). Most of us are blessed in one area, some two, but very few, the extraordinary ones, have all three.

That was Roger's genetic code – to think, feel and act in an extraordinary manner.

He had a wild brain that could see the moving parts of the most complex marketplace and then find opportunity. He was one of those rare left- and right-brain people, strategically minded, creatively oriented.

He was curious, a student of history, and he used the patterns he saw there to guide his team on the next stage in whatever journey they were on.

He also had an amazing heart. So many business people reach for a machete to solve their problems – cut manufacturing, reduce overhead, bully people into more productivity. Not Roger. He was a protector of people. At Hallmark he fought to keep manufacturing in Canada, to resist the "lift and adapt" invasion. He was the first to accept blame for any mistake and the first to put an employee on a pedestal for great work, even if much of the thinking came from him. He trusted

his partners and was immensely loyal.

I witnessed a great demonstration of his heart in 1992. I had to drive home for the last time from Communique, an agency I had created and built since 1980. It was a wonderful agency but that day I told my wife and our two small kids that there was no severance, benefits or any value for the 12 years. It was my fault we had sold out to an international agency that had gone bankrupt.

I got fired enough as a kid to know that being an employee wasn't on the agenda. The next day, Roger found me and

said he had a \$50,000 project for me, and could I bring an invoice so he could pay me immediately, as he felt I could use some cash flow. (I am not the only one he helped in this way through his career.)

In terms of his ability to do – well, Roger was a shit disturber. A contrarian. He would think nothing of painting the Diet Coke logo on a building about to be demolished, filming it and then sending it over to the Red Guys with a chuckle. He repurposed an entire Via train and sent it across Canada delivering Diet Pepsi.

With our agency he printed *Pop Life*, at the time the largest teen magazine in Canada, and invented new products for Hallmark that captured the imagination of the press and the pocketbook of the consumer. We even had 20 guys watch an endless stream of *Love Story* to teach them about romance and to win a TV. I thought it was the world's dumbest idea until national networks covered the event through the night.

In his final two years on the planet, he taught a marketing class and the kids there quickly got past his disabilities to fall in love with his abilities, his passion for marketing, his talent for weaving any strategy into a story and inviting you along for a ride.

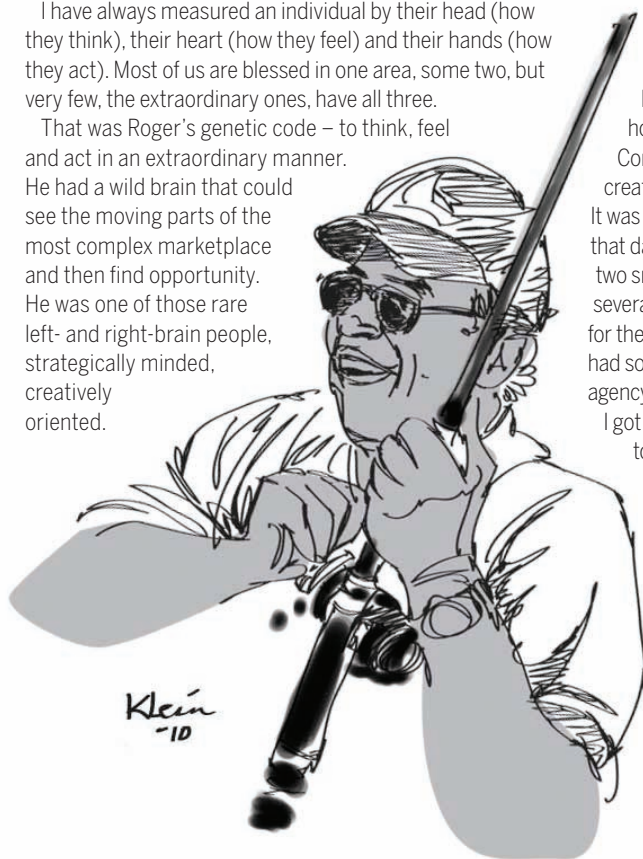
The world will miss Roger Baranowski, a wonderful father and husband, a beautiful friend who could tell stories like no other, someone who believed in people and had an ability to inspire them to do the impossible.

Roger, you put a dent in the universe.

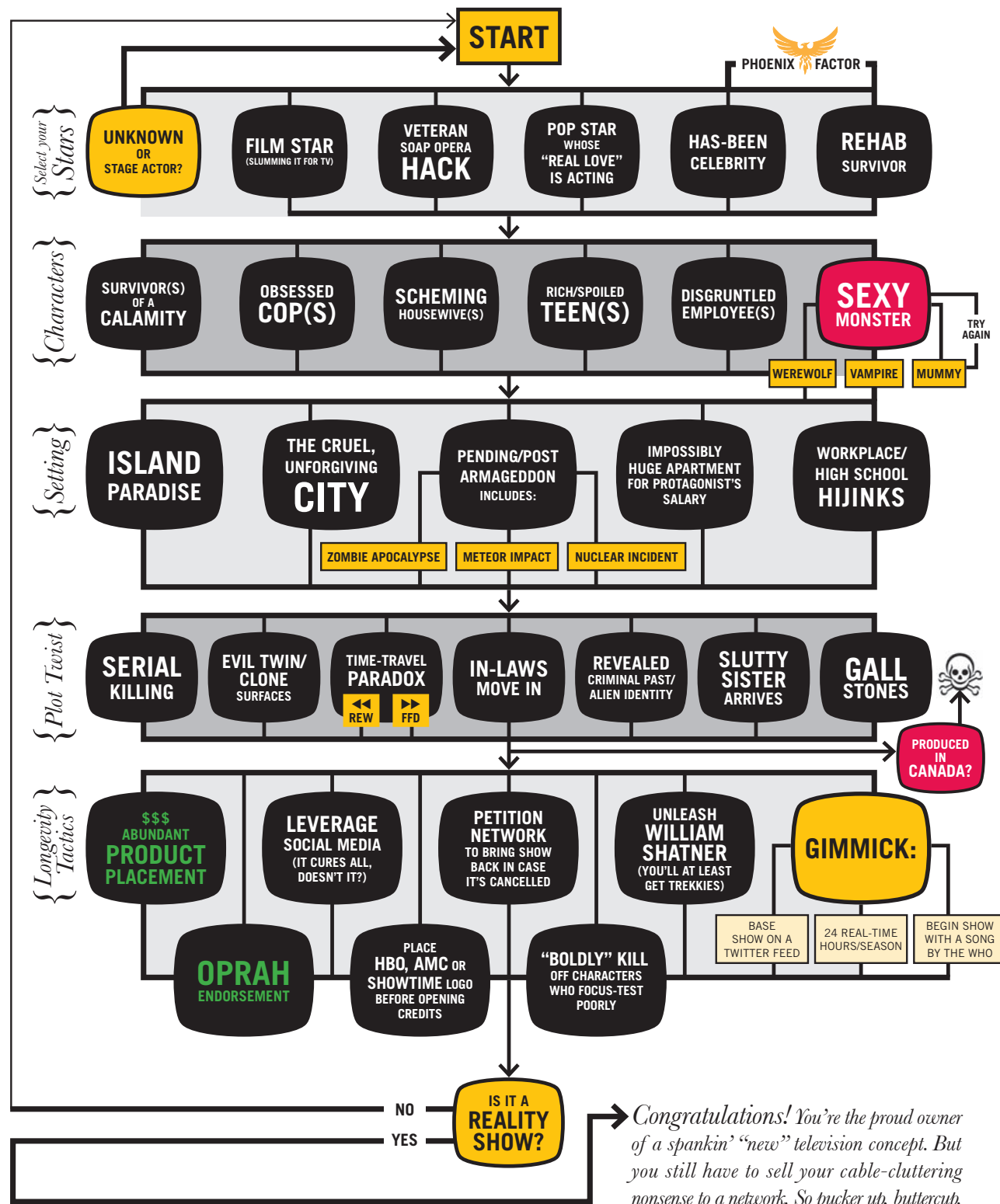
Tony Chapman is CEO of Toronto-based indie Capital C. tchapman@capitalc.net. Illustration by Bennett Klein, partner and CD at Capital C.

Roger Baranowski, 1953-2010

In addition to being an avid fisherman and an all round good sport, Baranowski was Pepsi group marketing director during the Cola Wars (1982-1993). He went on to become VP of DDB Needham (1993-1997) and president of Hallmark Cards (1997-2005), before teaching at Centennial College (2008-2009). After a courageous three-year battle with ALS, his journey ended May 27, surrounded by family and friends.



Despite their success, many hit shows are somewhat formulaic. To help you generate your own ratings juggernaut, the team at Clean Sheet created this handy, decision-making tool. Mix and match, have fun and remember to hang on to your creative integrity.



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